



County of San Mateo  
Probation  
John T. Keene, Chief Probation Officer  
400 County Center, Redwood City, CA 94063  
(650) 363-4123

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NOTICE OF INTENT TO AWARD  
RFP No. 2025-RFP-00559  
Research and Evaluation Services  
RESPONSE DEADLINE: August 12, 2025 at 5:00 pm

Tuesday, October 21, 2025

TO: All Proposers

RE: Intent to Award for RFP No. 2025-RFP-00559 - Research and Evaluation Services

This is a Letter of Intent to Award regarding Request for Proposals (RFP) No. 2025-RFP-00559 - Research and Evaluation Services, issued by the San Mateo County (the "County") on Tuesday, October 21, 2025. The County has evaluated the proposals received using the evaluation criteria identified in the RFP, and is hereby recommending that the County enter into an agreement with:

- Applied Survey Research

The Proposer listed above had the required qualifications and was identified as one of the top-ranked proposers by the evaluation team. The award decision is conditioned upon final approval by the Departmental Director or the Board of Supervisors.

Thank you for your interest in doing business with the County of San Mateo.

Sincerely,

Yanitxa Albino, Management Analyst  
222 Paul Scannell Dr,  
San Mateo, CA, 94402  
(650) 312-8826  
yalbino@smcgov.org

**AGREEMENT BETWEEN THE COUNTY OF SAN MATEO AND Applied Survey Research**

This Agreement is entered into this 18th day of November, 2025, by and between the County of San Mateo, a political subdivision of the state of California, hereinafter called "County," and Applied Survey Research, hereinafter called "Contractor."

\* \* \*

Whereas, pursuant to Section 31000 of the California Government Code, County may contract with independent contractors for the furnishing of such services to or for County or any Department thereof; and

Whereas, it is necessary and desirable that Contractor be retained for the purpose of Research and Evaluation Services.

**Now, therefore, it is agreed by the parties to this Agreement as follows:**

**1. Exhibits and Attachments**

The following exhibits and attachments are attached to this Agreement and incorporated into this Agreement by this reference:

Exhibit A—Services

Exhibit B—Payments and Rates

**2. Services to be performed by Contractor**

In consideration of the payments set forth in this Agreement and in Exhibit B, Contractor shall perform services for County in accordance with the terms, conditions, and specifications set forth in this Agreement and in Exhibit A.

**3. Payments**

In consideration of the services provided by Contractor in accordance with all terms, conditions, and specifications set forth in this Agreement and in Exhibit A, County shall make payment to Contractor based on the rates and in the manner specified in Exhibit B. County reserves the right to withhold payment if County determines that the quantity or quality of the work performed is unacceptable. In no event shall County's total fiscal obligation under this Agreement exceed NINE HUNDRED NINE THOUSAND, FOUR HUNDRED FOURTEEN DOLLARS (**\$909,414**). In the event that the County makes any advance payments, Contractor agrees to refund any amounts in excess of the amount owed by the County at the time of contract termination or expiration. Contractor is not entitled to payment for work not performed as required by this agreement.

**4. Term**

Subject to compliance with all terms and conditions, the term of this Agreement shall be from January 1, 2026, through December 31, 2030.

## **5. Termination**

This Agreement may be terminated by Contractor or by the Chief Probation Officer or his/her designee at any time without a requirement of good cause upon thirty (30) days' advance written notice to the other party. Subject to availability of funding, Contractor shall be entitled to receive payment for work/services provided prior to termination of the Agreement. Such payment shall be that prorated portion of the full payment determined by comparing the work/services actually completed to the work/services required by the Agreement.

County may terminate this Agreement or a portion of the services referenced in the Attachments and Exhibits based upon the unavailability of Federal, State, or County funds by providing written notice to Contractor as soon as is reasonably possible after County learns of said unavailability of outside funding.

County may terminate this Agreement for cause. In order to terminate for cause, County must first give Contractor notice of the alleged breach. Contractor shall have five business days after receipt of such notice to respond and a total of ten calendar days after receipt of such notice to cure the alleged breach. If Contractor fails to cure the breach within this period, County may immediately terminate this Agreement without further action. The option available in this paragraph is separate from the ability to terminate without cause with appropriate notice described above. In the event that County provides notice of an alleged breach pursuant to this section, County may, in extreme circumstances, immediately suspend performance of services and payment under this Agreement pending the resolution of the process described in this paragraph. County has sole discretion to determine what constitutes an extreme circumstance for purposes of this paragraph, and County shall use reasonable judgment in making that determination.

## **6. Contract Materials**

At the end of this Agreement, or in the event of termination, all finished or unfinished documents, data, studies, maps, photographs, reports, and other written materials (collectively referred to as "contract materials") prepared by Contractor under this Agreement shall become the property of County and shall be promptly delivered to County. Upon termination, Contractor may make and retain a copy of such contract materials if permitted by law.

## **7. Relationship to Parties**

Contractor agrees and understands that the work/services performed under this Agreement are performed as an independent contractor and not as an employee of County and that neither Contractor nor its employees acquire any of the rights, privileges, powers, or advantages of County employees.

## **8. Hold Harmless**

### **a. General Hold Harmless**

Contractor shall indemnify and save harmless County and its officers, agents, employees, and servants from all claims, suits, or actions of every name, kind, and description resulting from this Agreement, the performance of any work or services required of Contractor under this

Agreement, or payments made pursuant to this Agreement brought for, or on account of, any of the following:

- (A) injuries to or death of any person, including Contractor or its employees/officers/agents;
- (B) damage to any property of any kind whatsoever and to whomsoever belonging;
- (C) any sanctions, penalties, or claims of damages resulting from Contractor's failure to comply, if applicable, with the requirements set forth in the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and all Federal regulations promulgated thereunder, as amended; or
- (D) any other loss or cost, including but not limited to that caused by the concurrent active or passive negligence of County and/or its officers, agents, employees, or servants. However, Contractor's duty to indemnify and save harmless under this Section shall not apply to injuries or damage for which County has been found in a court of competent jurisdiction to be solely liable by reason of its own negligence or willful misconduct.

The duty of Contractor to indemnify and save harmless as set forth by this Section shall include the duty to defend as set forth in Section 2778 of the California Civil Code.

## **9. Assignability and Subcontracting**

Contractor shall not assign this Agreement or any portion of it to a third party or subcontract with a third party to provide services required by Contractor under this Agreement without the prior written consent of County. Any such assignment or subcontract without County's prior written consent shall give County the right to automatically and immediately terminate this Agreement without penalty or advance notice.

## **10. Insurance**

### **10.1. General Requirements**

Contractor shall not commence work or be required to commence work under this Agreement unless and until all insurance required under this Section has been obtained and such insurance has been approved by County's Risk Management, and Contractor shall use diligence to obtain such insurance and to obtain such approval. Contractor shall furnish County with certificates of insurance evidencing the required coverage, and there shall be a specific contractual liability endorsement extending Contractor's coverage to include the contractual liability assumed by Contractor pursuant to this Agreement. These certificates shall specify or be endorsed to provide that thirty (30) days' notice must be given, in writing, to County of any pending change in the limits of liability or of any cancellation or modification of the policy.

### **10.2. Workers' Compensation and Employer's Liability Insurance**

Contractor shall have in effect during the entire term of this Agreement workers' compensation and employer's liability insurance providing full statutory coverage. In signing this Agreement, Contractor certifies, as required by Section 1861 of the California Labor Code, that (a) it is aware of the provisions of Section 3700 of the California Labor Code, which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of the Labor Code, and (b) it will comply with such provisions before commencing the performance of work under this Agreement.

10.3. Liability Insurance

Contractor shall take out and maintain during the term of this Agreement such bodily injury liability and property damage liability insurance as shall protect Contractor and all of its employees/officers/agents while performing work covered by this Agreement from any and all claims for damages for bodily injury, including accidental death, as well as any and all claims for property damage which may arise from Contractor’s operations under this Agreement, whether such operations be by Contractor, any subcontractor, anyone directly or indirectly employed by either of them, or an agent of either of them. Such insurance shall be combined single limit bodily injury and property damage for each occurrence and shall not be less than the amounts specified below:

- (a) Comprehensive General Liability..... \$1,000,000
- (b) Motor Vehicle Liability Insurance..... \$1,000,000
- (c) Professional Liability..... \$1,000,000

County and its officers, agents, employees, and servants shall be named as additional insured on any such policies of insurance, which shall also contain a provision that (a) the insurance afforded thereby to County and its officers, agents, employees, and servants shall be primary insurance to the full limits of liability of the policy and (b) if the County or its officers, agents, employees, and servants have other insurance against the loss covered by such a policy, such other insurance shall be excess insurance only.

In the event of the breach of any provision of this Section, or in the event any notice is received which indicates any required insurance coverage will be diminished or canceled, County, at its option, may, notwithstanding any other provision of this Agreement to the contrary, immediately declare a material breach of this Agreement and suspend all further work and payment pursuant to this Agreement.

**11. Compliance With Laws**

All services to be performed by Contractor pursuant to this Agreement shall be performed in accordance with all applicable Federal, State, County, and municipal laws, ordinances, regulations, and executive orders, including but not limited to the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and the Federal Regulations promulgated thereunder, as amended (if applicable), the Business Associate requirements set forth in Attachment H (if attached), the Americans with Disabilities Act of 1990, as amended, and Section 504 of the Rehabilitation Act of 1973, which prohibits discrimination on the basis of disability in programs and activities receiving any Federal or County financial assistance, as well as any required economic or other sanctions imposed by the United States government or under state law in effect during the term of the Agreement. Such services shall also be performed in accordance with all applicable ordinances and regulations, including but not limited to appropriate licensure, certification regulations, provisions pertaining to confidentiality of records, and applicable quality assurance regulations. In the event of a conflict between the terms of this Agreement and any applicable State, Federal, County, or municipal law, regulation, or executive order, the requirements of the applicable law, regulation, or executive order will take precedence over the requirements set forth in this Agreement.

Contractor will timely and accurately complete, sign, and submit all necessary documentation of compliance.

## **12. Levine Act Compliance**

The Contractor certifies and warrants that Contractor has fully complied, and will remain in full compliance, with all applicable requirements of the Levine Act in connection with this Agreement, including making any required disclosures of campaign contributions to County Officers, which includes but may not be limited to elected County Officers. Elected County Officers include members of the San Mateo County Board of Supervisors, as well as the Assessor-County Clerk-Recorder, Controller, Coroner, District Attorney, Sheriff, and Tax Collector-Treasurer. Any campaign contribution required to be disclosed under the Levine Act in connection with this Agreement shall be disclosed on the disclosure form provided by the County of San Mateo Levine Act Disclosure Form, a copy of which is available from the County upon request.

## **13. Non-Discrimination and Other Requirements**

### **13.1. General Non-discrimination**

No person shall be denied any services provided pursuant to this Agreement (except as limited by the scope of services) on the grounds of race, color, national origin, ancestry, age, disability (physical or mental), sex, sexual orientation, gender identity, marital or domestic partner status, religion, political beliefs or affiliation, familial or parental status (including pregnancy), medical condition (cancer-related), military service, or genetic information.

### **13.2. Equal Employment Opportunity**

Contractor shall ensure equal employment opportunity based on objective standards of recruitment, classification, selection, promotion, compensation, performance evaluation, and management relations for all employees under this Agreement. Contractor's equal employment policies shall be made available to County upon request.

### **13.3. Section 504 of the Rehabilitation Act of 1973**

Contractor shall comply with Section 504 of the Rehabilitation Act of 1973, as amended, which provides that no otherwise qualified individual with a disability shall, solely by reason of a disability, be excluded from the participation in, be denied the benefits of, or be subjected to discrimination in the performance of any services this Agreement. This Section applies only to contractors who are providing services to members of the public under this Agreement.

### **13.4. Compliance with County's Equal Benefits Ordinance**

Contractor shall comply with all laws relating to the provision of benefits to its employees and their spouses or domestic partners, including, but not limited to, such laws prohibiting discrimination in the provision of such benefits on the basis that the spouse or domestic partner of the Contractor's employee is of the same or opposite sex as the employee.

### **13.5. Discrimination Against Individuals with Disabilities**

The nondiscrimination requirements of 41 C.F.R. 60-741.5(a) are incorporated into this Agreement as if fully set forth here, and Contractor and any subcontractor shall abide by the requirements of 41 C.F.R. 60-741.5(a). This regulation prohibits discrimination against qualified

individuals on the basis of disability and requires affirmative action by covered prime contractors and subcontractors to employ and advance in employment qualified individuals with disabilities.

#### 13.6. History of Discrimination

Contractor certifies that no finding of discrimination has been issued in the past 365 days against Contractor by the Equal Employment Opportunity Commission, the California Department of Fair Employment and Housing, or any other investigative entity. If any finding(s) of discrimination have been issued against Contractor within the past 365 days by the Equal Employment Opportunity Commission, the California Department of Fair Employment and Housing, or other investigative entity, Contractor shall provide County with a written explanation of the outcome(s) or remedy for the discrimination prior to execution of this Agreement. Failure to comply with this Section shall constitute a material breach of this Agreement and subjects the Agreement to immediate termination at the sole option of the County.

#### 13.7. Reporting; Violation of Non-discrimination Provisions

Contractor shall report to the County Executive Officer the filing in any court or with any administrative agency of any complaint or allegation of discrimination on any of the bases prohibited by this Section of the Agreement or the Section titled "Compliance with Laws". Such duty shall include reporting of the filing of any and all charges with the Equal Employment Opportunity Commission, the California Department of Fair Employment and Housing, or any other entity charged with the investigation or adjudication of allegations covered by this subsection within 30 days of such filing, provided that within such 30 days such entity has not notified Contractor that such charges are dismissed or otherwise unfounded. Such notification shall include a general description of the circumstances involved and a general description of the kind of discrimination alleged (for example, gender-, sexual orientation-, religion-, or race-based discrimination).

Violation of the non-discrimination provisions of this Agreement shall be considered a breach of this Agreement and subject the Contractor to penalties, to be determined by the County Executive Officer, including but not limited to the following:

- i. termination of this Agreement;
- ii. disqualification of the Contractor from being considered for or being awarded a County contract for a period of up to 3 years;
- iii. liquidated damages of \$2,500 per violation; and/or
- iv. imposition of other appropriate contractual and civil remedies and sanctions, as determined by the County Executive Officer.

To effectuate the provisions of this Section, the County Executive Officer shall have the authority to offset all or any portion of the amount described in this Section against amounts due to Contractor under this Agreement or any other agreement between Contractor and County.

#### 13.8. Compliance with Living Wage Ordinance

As required by Chapter 2.88 of the San Mateo County Ordinance Code, Contractor certifies all contractor(s) and subcontractor(s) obligated under this contract shall fully comply with the provisions of the County of San Mateo Living Wage Ordinance, including, but not limited to,

paying all Covered Employees the current Living Wage and providing notice to all Covered Employees and Subcontractors as required under the Ordinance.

#### **14. Compliance with County Employee Jury Service Ordinance**

Contractor shall comply with Chapter 2.85 of the County's Ordinance Code, which states that Contractor shall have and adhere to a written policy providing that its employees, to the extent they are full-time employees and live in San Mateo County, shall receive from the Contractor, on an annual basis, no fewer than five days of regular pay for jury service in San Mateo County, with jury pay being provided only for each day of actual jury service. The policy may provide that such employees deposit any fees received for such jury service with Contractor or that the Contractor may deduct from an employee's regular pay the fees received for jury service in San Mateo County. By signing this Agreement, Contractor certifies that it has and adheres to a policy consistent with Chapter 2.85. For purposes of this Section, if Contractor has no employees in San Mateo County, it is sufficient for Contractor to provide the following written statement to County: "For purposes of San Mateo County's jury service ordinance, Contractor certifies that it has no full-time employees who live in San Mateo County. To the extent that it hires any such employees during the term of its Agreement with San Mateo County, Contractor shall adopt a policy that complies with Chapter 2.85 of the County's Ordinance Code." The requirements of Chapter 2.85 do not apply unless this Agreement's total value listed in the Section titled "Payments", exceeds two-hundred thousand dollars (\$200,000); Contractor acknowledges that Chapter 2.85's requirements will apply if this Agreement is amended such that its total value exceeds that threshold amount.

#### **15. Retention of Records; Right to Monitor and Audit**

(a) Contractor shall maintain all required records relating to services provided under this Agreement for three (3) years after County makes final payment and all other pending matters are closed, and Contractor shall be subject to the examination and/or audit by County, a Federal grantor agency, and the State of California.

(b) Contractor shall comply with all program and fiscal reporting requirements set forth by applicable Federal, State, and local agencies and as required by County.

(c) Contractor agrees upon reasonable notice to provide to County, to any Federal or State department having monitoring or review authority, to County's authorized representative, and/or to any of their respective audit agencies access to and the right to examine all records and documents necessary to determine compliance with relevant Federal, State, and local statutes, rules, and regulations, to determine compliance with this Agreement, and to evaluate the quality, appropriateness, and timeliness of services performed.

#### **16. Merger Clause; Amendments**

This Agreement, including the Exhibits and Attachments attached to this Agreement and incorporated by reference, constitutes the sole Agreement of the parties to this Agreement and correctly states the rights, duties, and obligations of each party as of this document's date. In the event that any term, condition, provision, requirement, or specification set forth in the body of this Agreement conflicts with or is inconsistent with any term, condition, provision, requirement, or specification in any Exhibit and/or Attachment to this Agreement, the provisions of the body of the Agreement shall prevail. Any prior agreement, promises, negotiations, or

representations between the parties not expressly stated in this document are not binding. All subsequent modifications or amendments shall be in writing and signed by the parties.

## **17. Controlling Law; Venue**

The validity of this Agreement and of its terms, the rights and duties of the parties under this Agreement, the interpretation of this Agreement, the performance of this Agreement, and any other dispute of any nature arising out of this Agreement shall be governed by the laws of the State of California without regard to its choice of law or conflict of law rules. Any dispute arising out of this Agreement shall be venued either in the San Mateo County Superior Court or in the United States District Court for the Northern District of California.

## **18. Notices**

Any notice, request, demand, or other communication required or permitted under this Agreement shall be deemed to be properly given when both: (1) transmitted via email to the email address listed below; and (2) sent to the physical address listed below by either being deposited in the United States mail, postage prepaid, or deposited for overnight delivery, charges prepaid, with an established overnight courier that provides a tracking number showing confirmation of receipt.

In the case of County, to:

Name/Title: John T. Keene  
Address: 222 Paul Scannell Dr, San Mateo, CA, 94402  
Telephone: 650.312.8816  
Email: jkeene@smcgov.org

In the case of Contractor, to:

Name/Title: Kim Carpenter  
Address: 55 Penny Lane STE 101 Watsonville, CA 95077  
Telephone: 831-728-1356  
Email: kim@appliedsurveyresearch.org

## **19. Electronic Signature**

Both County and Contractor wish to permit this Agreement and future documents relating to this Agreement to be digitally signed in accordance with California law and County's Electronic Signature Administrative Memo. Any party to this Agreement may revoke such agreement to permit electronic signatures at any time in relation to all future documents by providing notice pursuant to this Agreement.

## **20. Indirect Costs**

### **20.1. Indirect Costs (County De Minimis)**

The County's De Minimis indirect cost rate shall apply for indirect costs paid to Contractor under this Agreement. The De Minimis indirect cost rate is calculated as up to 15% of the Modified Total Direct Costs ("MTDC"). MTDC means all direct salaries and wages, applicable fringe benefits, materials and supplies, services, travel, and up to the first \$50,000 of each subaward (regardless of the period of performance of the subawards under the award). MTDC excludes

equipment, capital expenditures, charges for patient care, rental costs, tuition remission, scholarships and fellowships, participant support costs, and the portion of each subaward in excess of \$50,000. While Contractor will not be required to submit documentation supporting indirect costs with their invoices, Contractor shall maintain such documentation for audit purposes for the retention period set forth in this Agreement.

## 21. Personally Identifiable Information

### Requirements for County Contractors, Subcontractors, Vendors and Agents

#### 21.1. Definitions

Personally Identifiable Information (PII), or Sensitive Personal Information (SPI), as used in Federal information security and privacy laws, is information that can be used on its own or with other information to identify, contact, or locate a single person, or to identify an individual in context. PII may only be used to assist in the administration of programs in accordance with 45 C.F.R. § 205.40, *et seq.* and California Welfare & Institutions Code section 10850.

a. **“Assist in the Administration of the Program”** means performing administrative functions on behalf of County programs, such as determining eligibility for, or enrollment in, and collecting context PII for such purposes, to the extent such activities are authorized by law.

b. **“Breach”** refers to actual loss, loss of control, compromise, unauthorized disclosure, unauthorized acquisition, unauthorized access, or any similar term referring to situations where persons other than authorized users and for other than authorized purposes have access or potential access to context PII, whether electronic, paper, verbal, or recorded.

c. **“Contractor”** means those contractors, subcontractors, vendors and agents of the County performing any functions for the County that require access to and/or use of PII and that are authorized by the County to access and use PII.

d. **“Personally Identifiable Information” or “PII”** is personally identifiable information that can be used alone, or in conjunction with any other reasonably available information, to identify a specific individual. PII includes, but is not limited to, an individual's name, social security number, driver's license number, identification number, biometric records, date of birth, place of birth, or mother's maiden name. PII may be electronic, paper, verbal, or recorded.

e. **“Security Incident”** means the attempted or successful unauthorized access, use, disclosure, modification, or destruction of PII, or interference with system operations in an information system which processes PII that is under the control of the County or County's Statewide Automated Welfare System (SAWS) Consortium, or under the control of a contractor, subcontractor or vendor of the County, on behalf of the County.

f. **“Secure Areas”** means any area where:

- i. Contractors administer or assist in the administration of County programs; ii. PII is used or disclosed; or
- iii. PII is stored in paper or electronic format.

## 21.2. Restrictions on Contractor re Use and Disclosure of PII

- a. Contractor agrees to use or disclose PII only as permitted in this Agreement and only to assist in the administration of programs in accordance with 45 CFR § 205.50, *et seq.* and California Welfare & Institutions Code section 10850 or as otherwise authorized or required by law. Disclosures, when authorized or required by law, such as in response to a court order, or when made upon the explicit written authorization of the individual, who is the subject of the PII, are allowable. Any other use or disclosure of PII requires the express approval in writing by the County. No Contractor shall duplicate, disseminate or disclose PII except as allowed in this Agreement.
- b. Contractor agrees to only use PII to perform administrative functions related to the administration of County programs to the extent applicable.
- c. Contractor agrees that access to PII shall be restricted to Contractor's staff who need to perform specific services in the administration of County programs as described in this Agreement.
- d. Contractor understands and agrees that any of its staff who accesses, discloses or uses PII in a manner or for a purpose not authorized by this Agreement may be subject to civil and criminal sanctions available under applicable Federal and State laws and regulations

## 21.3. Use of Safeguards by Contractor to Protect PII

- a. Contractor agrees to ensure that any agent, including a subcontractor, to whom it provides PII received from, or created or received by Contractor on behalf of County, agrees to adhere to the same restrictions and conditions contained in this Attachment PII.
- b. Contractor agrees to advise its staff who have access to PII, of the confidentiality of the information, the safeguards required to protect the information, and the civil and criminal sanctions for non-compliance contained in applicable Federal and State laws and regulations.
- c. Contractor agrees to train and use reasonable measures to ensure compliance by Contractor's staff, including, but not limited to (1) providing initial privacy and security awareness training to each new staff within thirty (30) days of employment; (2) thereafter, providing annual refresher training or reminders of the PII privacy and security safeguards to all Contractor's staff; (3) maintaining records indicating each Contractor's staff name and the date on which the privacy and security awareness training was completed; and (4) retaining training records for a period of three (3) years after completion of the training.
- d. Contractor agrees to provide documented sanction policies and procedures for Contractor's staff who fail to comply with privacy policies and procedures or any provisions of these requirements, including termination of employment when appropriate.
- e. Contractor agrees that all Contractor's staff performing services under this Agreement sign a confidentiality statement prior to accessing PII and annually thereafter. The signed statement shall be retained for a period of three (3) years, and the statement include at a minimum: (1) general use; (2) security and privacy safeguards; (3) unacceptable use; and (4) enforcement policies.
- f. Contractor agrees to conduct a background check of Contractor's staff before they may access PII with more thorough screening done for those employees who are authorized to

bypass significant technical and operational security controls. Contractor further agrees that screening documentation shall be retained for a period of three (3) years following conclusion of the employment relationship.

g. Contractor agrees to conduct periodic privacy and security reviews of work activity, including random sampling of work product by Contractor's staff by management level personnel who are knowledgeable and experienced in the areas of privacy and information security in the administration of County's programs and the use and disclosure of PII. Examples include, but are not limited to, access to data, case files or other activities related to the handling of PII.

h. Contractor shall ensure that PII is used and stored in an area that is physically safe from access by unauthorized persons at all times and safeguard PII from loss, theft, or inadvertent disclosure by securing all areas of its facilities where Contractor's staff assist in the administration of the County's programs and use, disclose, or store PII.

i. Contractor shall ensure that each physical location, where PII is used, disclosed, or stored, has procedures and controls that ensure an individual who is terminated from access to the facility is promptly escorted from the facility by an authorized employee of Contractor and access is revoked.

j. Contractor shall ensure that there are security guards or a monitored alarm system at all times at Contractor's facilities and leased facilities where five hundred (500) or more individually identifiable records of PII is used, disclosed, or stored. Video surveillance systems are recommended.

k. Contractor shall ensure that data centers with servers, data storage devices, and/or critical network infrastructure involved in the use, storage, and/or processing of PII have perimeter security and physical access controls that limit access to only those authorized by this Agreement. Visitors to any Contractor data centers area storing PII as a result of administration of a County program must be escorted at all times by authorized Contractor's staff.

l. Contractor shall have policies that include, based on applicable risk factors, a description of the circumstances under which Contractor staff can transport PII, as well as the physical security requirements during transport.

m. Contractor shall ensure that any PII stored in a vehicle shall be in a non-visible area such as a trunk, that the vehicle is locked, and under no circumstances permit PII be left unattended in a vehicle overnight or for other extended periods of time.

n. Contractor shall ensure that PII shall not be left unattended at any time in airplanes, buses, trains, etc., including baggage areas. This should be included in training due to the nature of the risk.

o. Contractor shall ensure that all workstations and laptops, which use, store and/or process PII, must be encrypted using a FIPS 140-2 certified algorithm 128 bit or higher, such as Advanced Encryption Standard (AES). The encryption solution must be full disk. It is encouraged, when available and when feasible, that the encryption be 256 bit.

p. Contractor shall ensure that servers containing unencrypted PII must have sufficient administrative, physical, and technical controls in place to protect that data, based upon a risk

assessment/system security review. It is recommended to follow the guidelines documented in the latest revision of the National Institute of Standards and Technology (NIST) Special Publication (SP) 800-53, Security and Privacy Controls for Federal Information Systems and Organizations.

q. Contractor agrees that only the minimum necessary amount of PII required to perform required business functions will be accessed, copied, downloaded, or exported.

r. Contractor shall ensure that all electronic files, which contain PII data is encrypted when stored on any mobile device or removable media (i.e. USB drives, CD/DVD, smartphones, tablets, backup tapes etc.). Encryption must be a FIPS 140-2 certified algorithm 128 bit or higher, such as AES. It is encouraged, when available and when feasible, that the encryption be 256 bit.

s. Contractor shall ensure that all workstations, laptops and other systems, which process and/or store PII, must install and actively use an antivirus software solution. Antivirus software should have automatic updates for definitions scheduled at least daily. In addition, Contractor shall ensure that:

i. All workstations, laptops and other systems, which process and/or store PII, must have critical security patches applied, with system reboot if necessary.

ii. There must be a documented patch management process that determines installation timeframe based on risk assessment and vendor recommendations.

iii. At a maximum, all applicable patches deemed as critical must be installed within thirty (30) days of vendor release. It is recommended that critical patches which are high risk be installed within seven (7) days.

iv. Applications and systems that cannot be patched within this time frame, due to significant operational reasons, must have compensatory controls implemented to minimize risk.

t. Contractor shall ensure that all of its staff accessing Personally Identifiable Information on applications and systems will be issued a unique individual password that is a least eight (8) characters, a non-dictionary word, composed of characters from at least three (3) of the following four (4) groups from the standard keyboard: upper case letters (A-Z); lower case letters (a-z); Arabic numerals (0-9) and special characters (!, @, #, etc.). Passwords are not to be shared and changed if revealed or compromised. All passwords must be changed every (90) days or less and must not be stored in readable format on the computer or server.

u. Contractor shall ensure that usernames for its staff authorized to access PII will be promptly disabled, deleted, or the password changed upon the transfer or termination of an employee within twenty- four (24) hours. Note: Twenty-four (24) hours is defined as one (1) working day.

v. Contractor shall ensure when no longer needed, all PII must be cleared, purged, or destroyed consistent with NIST SP 800-88, Guidelines for Media Sanitization, such that the Personally Identifiable Information cannot be retrieved.

w. Contractor shall ensure that all of its systems providing access to PII must provide an automatic timeout, requiring re-authentication of the user session after no more than twenty (20) minutes of inactivity.

x. Contractor shall ensure that all of its systems providing access to PII must display a warning banner stating, at a minimum that data is confidential; systems are logged, systems use is for business purposes only by authorized users and users shall log off the system immediately if they do not agree with these requirements.

y. Contractor will ensure that all of its systems providing access to PII must maintain an automated audit trail that can identify the user or system process which initiates a request for PII, or alters PII. The audit trail shall be date and time stamped; log both successful and failed accesses be read-access only; and be restricted to authorized users. If PII is stored in a database, database logging functionality shall be enabled. The audit trail data shall be archived for at least three (3) years from the occurrence.

z. Contractor shall ensure that all of its systems providing access to PII shall use role-based access controls for all user authentications, enforcing the principle of least privilege.

aa. Contractor shall ensure that all data transmissions of PII outside of its secure internal networks must be encrypted using a Federal Information Processing Standard (FIPS) 140-2 certified algorithm that is 128 bit or higher, such as Advanced Encryption Standard (AES) or Transport Layer Security (TLS). It is encouraged, when available and when feasible, that 256 bit encryption be used. Encryption can be end to end at the network level, or the data files containing PII can be encrypted. This requirement pertains to any type of PII in motion such as website access, file transfer, and email.

bb. Contractor shall ensure that all of its systems involved in accessing, storing, transporting, and protecting PII, which are accessible through the Internet, must be protected by an intrusion detection and prevention solution.

cc. Contractor shall ensure that audit control mechanisms are in place. All Contractor systems processing and/or storing Personally Identifiable Information must have a least an annual system risk assessment/security review that ensure administrative, physical, and technical controls are functioning effectively and provide an adequate level of protection. Review shall include vulnerability scanning tools.

dd. Contractor shall ensure that all of its systems processing and/or storing PII must have a process or automated procedure in place to review system logs for unauthorized access.

ee. Contractor shall ensure that all of its systems processing and/or storing PII must have a documented change control process that ensures separation of duties and protects the confidentiality, integrity and availability of data.

ff. Contractor shall establish a documented plan to enable continuation of critical business processes and protection of the security of PII kept in an electronic format in the event of an emergency. Emergency means any circumstance or situation that causes normal computer operations to become unavailable for use in performing the work required under this Agreement for more than twenty-four (24) hours.

gg. Contractor shall ensure its data centers with servers, data storage devices, and critical network infrastructure involved in the use, storage and/or processing of PII, must include environmental protection such as cooling, power, and fire prevention, detection, and suppression.

hh. Contractor shall establish documented procedures to backup PII to maintain retrievable exact copies of PII. The documented backup procedures shall contain a schedule which includes incremental and full backups, storing backups offsite, inventory of backup media, recovery of PII data, an estimate of the amount of time needed to restore PII data.

ii. Contractor shall ensure that PII in paper form shall not be left unattended at any time, unless it is locked space such as a file cabinet, file room, desk or office. Unattended means that information may be observed by an individual not authorized to access the information. Locked spaces are defined as locked file cabinets, locked file rooms, locked desks, or locked offices in facilities which are multi-use, meaning that there are Contractor's staff and non-Contractor functions in one building in work areas that are not securely segregated from each other. It is recommended that all PII be locked up when unattended at any time, not just within multi-use facilities.

jj. Contractor shall ensure that any PII that must be disposed of will be through confidential means, such as cross cut shredding or pulverizing.

kk. Contractor agrees that PII must not be removed from its facilities except for identified routine business purposes or with express written permission of the County.

ll. Contractor shall ensure that faxes containing PII shall not be left unattended and fax machines shall be in secure areas. Faxes containing PII shall contain a confidentiality statement notifying persons receiving faxes in error to destroy them and notify the sender. All fax numbers shall be verified with the intended recipient before send the fax.

mm. Contractor shall ensure that mailings containing PII shall be sealed and secured from damage or inappropriate viewing of PII to the extent possible. Mailings that include five hundred (500) or more individually identifiable records containing PII in a single package shall be sent using a tracked mailing method that includes verification of delivery.

#### 21.4. Reporting of Breaches Required by Contractor to County; Mitigation

a. Contractor shall report to County within one business day of discovery, to the County contact listed in this agreement by email or telephone as listed in the of unsecured PII, if that PII was, or is, reasonably believed to have been accessed or acquired by an unauthorized person, any suspected security incident, intrusion or unauthorized access, use or disclosure of PII in violation of this Agreement, or potential loss of confidential data affecting this Agreement.

b. Contractor understands that State and Federal Law requires a breaching entity to notify individuals of a breach or unauthorized disclosure of their PII. Contractor shall ensure that said notifications shall comply with the requirements set forth in California Civil Code section 1798.29, and 42 U.S.C. section 17932, and its implementing regulations, including but not limited to, the requirement that the notifications be made without unreasonable delay and in no event later than sixty (60) calendar days.

c. Contractor agrees to promptly mitigate, to the extent practicable, any harmful effect that is known to Contractor stemming from a use or disclosure of PII in violation of the requirements of this Agreement, including taking any action pertaining to such use or disclosure required by applicable Federal and State laws and regulations.

#### 21.5. Permitted Uses and Disclosures of PII by Contractor

Except as otherwise limited in this schedule, Contractor may use or disclose PII to perform functions, activities, or services for, or on behalf of, County as specified in the Agreement; provided that such use or disclosure would not violate the Privacy Rule if done by County.

#### 21.6. Obligations of County

a. County shall provide Contractor with the notice of privacy practices that County produces in accordance with California Welfare and Institutions Code section 10850, as well as any changes to such notice.

b. County shall notify Contractor of any changes in, or revocation of, permission by Individual to use or disclose PII, if such changes affect Contractor's permitted or required uses and disclosures.

c. County shall notify Contractor of any restriction to the use or disclosure of PII that County has agreed to in accordance with California Welfare and Institutions Code section 10850.

#### 21.7. Permissible Requests by County

County shall not request Contractor to use or disclose PII in any manner that would not be permissible under the Privacy Rule if so requested by County, unless Contractor will use or disclose PII for, and if the Agreement provides for, data aggregation or management and administrative activities of Contractor.

#### 21.8. Duties Upon Termination of Agreement

a. Upon termination of the Agreement, for any reason, Contractor shall return or destroy all PII received from County, or created, maintained, or received by Contractor on behalf of County that Contractor still maintains in any form. This provision shall apply to PII that is in the possession of subcontractors or agents of Contractor. Contractor shall retain no copies of the PII.

b. In the event that Contractor determines that returning or destroying PII is infeasible, Contractor shall provide to County notification of the conditions that make return or destruction infeasible. Upon mutual Agreement of the Parties that return or destruction of PII is infeasible, Contractor shall extend the protections of the Agreement to such PII and limit further uses and disclosures of such PII to those purposes that make the return or destruction infeasible, for so long as Contractor maintains such PII.

#### 21.9. Miscellaneous

a. **Regulatory References.** A reference in this Attachment to a section in the Personally Identifiable Information Privacy Rule means the section as in effect or as amended, and for which compliance is required.

b. **Amendment.** The Parties agree to take such action as is necessary to amend this Schedule from time to time as is necessary for County to comply with the requirements of the Privacy Rule and in accordance 45 CFR § 205.40, *et seq.* and California Welfare and Institutions Code section 10850.

c. **Survival.** The respective rights and obligations of Contractor under this Attachment shall survive the termination of the Agreement unless and until the PII is destroyed or returned to the County.

d. **Interpretation.** Any ambiguity in any provision in this Attachment shall be resolved in favor of a meaning that permits County to comply with the Privacy Rule.

e. **Reservation of Right to Monitor Activities.** County reserves the right to monitor the security policies and procedures of Contractor.

## **22. Rehabilitation Act of 1973**

Refer to the attachment required to be completed by the Contractor.

SIGNATURE PAGE TO FOLLOW

In witness of and in agreement with this Agreement's terms, the parties, by their duly authorized representatives, affix their respective signatures:

For Contractor: Applied Survey Research

<i>Kim Carpenter</i>	10/10/2025	Kim Carpenter
_____ Contractor Signature	_____ Date	_____ Contractor Name (please print)

---

COUNTY OF SAN MATEO

By: *Dad J. Conner*  
President, Board of Supervisors, San Mateo County

Resolution No. 081522

Date: 11/20/2025

ATTEST:

*Phil Allegro*  
By:  
Clerk of Said Board

Exhibit A  
Applied Survey Research  
Services

In consideration of the payments set forth in Exhibit B, the Contractor shall provide the following services:

**I. Meetings and Collaborations**

- A. Meet monthly with Probation staff to review ongoing work.
- B. Attend quarterly JJCC and CBO meetings and up to three Realignment Subcommittee meetings annually.

**II. Program Evaluations and Annual Reports**

- A. Assess the effectiveness of juvenile programs operated by community-based organizations (JJCPA, JPAF, YOBG, and JJRBG).
- B. Collect and analyze quantitative and qualitative data, including program dosage, client demographics, outcomes, strengths, challenges, and success stories.
- C. Assist in survey design and provide technical assistance to CBOs on data collection and evidence-based assessment tools.
- D. Produce two annual reports (YOBG/JJRBG and JJCPA/JPAF) and presentation materials for JJCC. Reports will be clear, public-facing, and support data-driven decision-making.

**III. Local Action Plan (LAP) Development**

- A. Consult on and draft the County's 2030–2035 LAP, including:
  - a. Assessment of resources and high-risk areas
  - b. Integrated juvenile justice strategies
  - c. Information-sharing protocols and performance measures
  - d. Data system assessments and optional elements such as target populations and rehabilitation goals
  - e. Identification of challenges and recommendations
- B. Collect stakeholder input through listening sessions, interviews, and surveys.

**IV. Results-Based Accountability and Dashboard**

- A. Facilitate stakeholder discussions to define and implement performance measures aligned with the LAP.
- B. Design shared metrics that track short- and long-term outcomes and systems-level impacts.
- C. Assess progress on indicators and provide actionable insights.
- D. Develop and maintain an interactive, user-friendly online dashboard updated annually.

**V. Juvenile Justice Crime Prevention Act (JJCPA) and Youthful Offender Block Grant (YOBG) Program Plan & Juvenile Justice Realignment Block Grant (JJRBG) Plan**

- A. Assist in preparing annual JJCPA/YOBG and JJRBG Plans, describing programs, placements, strategies, and system enhancements.
- B. Facilitate public processes in collaboration with Probation.

**VI. Evaluation of Youth & Family Resource Guide**

- A. Assess and update Probation Department resources for youth and families, including services for law enforcement, education, mental health, health, social services, and substance use.

**VII. Deliverables**

- A. Two Juvenile Services Annual Reports (JJCPA/JPAF and JJRBG/YOBG) per year
- B. Two presentations to JJCC and CBOs of Annual Reports per year
- C. Youth and their Families Resource Guides annual updates
- D. Two Annual Plans (JJCPA-YOBG and JJRBG) per year
- E. Interactive Local Action Plan progress dashboard and annual updates
- F. Final 2030 Local Action Plan Report
- G. Local Action Plan presentation JJCC and CBOs

Exhibit B  
Applied Survey Research  
Payments

In consideration of the services provided by the Contractor described in Exhibit A and subject to the terms of the Agreement, the County shall pay the Contractor based on the following fee schedule and terms:

Payment Terms

**I. Maximum Obligation**

In no event shall the County's total fiscal obligation under this Agreement exceed **NINE HUNDRED NINE THOUSAND, FOUR HUNDRED FOURTEEN DOLLARS (\$909,414.00)**.

**II. Reimbursement and Allowable Costs**

The County shall reimburse the Contractor for allowable expenses, up to the limits set forth in the *Payment Schedule*, in exchange for the services described in Exhibit A. The County shall not reimburse expenditures not reported within sixty (60) calendar days after the close of the last month of the fiscal year of the Agreement term.

**III. Unexpended Funds**

Any unspent funds in a given fiscal year may, with the mutual written agreement of both parties, be carried forward to the following fiscal year and used for services described in Exhibit A. Written approval may be provided via email.

**IV. Invoicing Requirements**

- A. Contractor shall submit invoices on a quarterly basis.
- B. JIRBG-funded services shall be invoiced separately.
- C. Each invoice must include:
  - 1. Contractor's name and address
  - 2. Agreement number
  - 3. Funding stream
  - 4. Invoice number
  - 5. Fiscal year and quarter
  - 6. Date and description of services
  - 7. Services provided and billable hours (via Invoice Tracker)
  - 8. Total invoice amount
  - 9. Year-to-date expenditures and remaining contract balance
  - 10. Comply with any additional invoicing instructions issued by the County through Coupa.

**V. Submission Method**

Contractors are encouraged to submit invoices electronically through the County of San Mateo's Coupa Supplier Portal. The County will provide enrollment instructions and resources, and additional supplier support is available directly from Coupa. Failure to register or follow invoicing requirements may result in delayed payment. Resources and support are available on this website:

<https://supplier.coupa.com/county-of-san-mateo-e-invoicing/#>, or by email [supplier\\_support@smcgov.org](mailto:supplier_support@smcgov.org).

**VI. Payment Processing**

The County shall process properly submitted invoices in accordance with the *Payment Schedule*. Payment will be made only for services rendered and/or expenses incurred under Exhibit A, and only after acceptance of services and deliverables by the County's authorized representative.

**VII. Remittance Address**

55 Penny Lane  
STE 101  
Watsonville, CA 95077

### VIII. Payment Schedule and Allocation of Hours

The estimated hours allocated for the line-item tasks in the Payment Schedule may be adjusted upon request by the Contractor, provided that the written approval of the Probation Department is obtained and the overall not-to-exceed amount of the Agreement remains unchanged.

	2026 Hours	2026 Cost	2027 Hours	2027 Cost	2028 Hours	2028 Cost	2029 Hours	2029 Cost	2030 Hours	2030 Cost	Total
<b>Deliverables</b>	<i>Rate:</i>	\$175	<i>Rate:</i>	\$175	<i>Rate:</i>	\$180	<i>Rate:</i>	\$180	<i>Rate:</i>	\$185	
Meetings & Collaboration	100	\$17,500	100	\$17,500	100	\$18,000	100	\$18,000	100	\$18,500	<b>\$89,500</b>
Update Annual Plans	75	\$13,125	60	\$10,500	60	\$10,800	60	\$10,800	60	\$11,100	<b>\$56,325</b>
Program Evaluation & Annual Reports	570	\$99,750	530	\$92,750	530	\$95,400	530	\$95,400	530	\$98,050	<b>\$481,350</b>
Evaluation of Existing Resources	24	\$4,200	24	\$4,200	24	\$4,320	24	\$4,320	70	\$12,950	<b>\$29,990</b>
Local Action Plan (LAP) Development	100	\$17,500	24	\$4,200	20	\$3,600	50	\$9,000	605	\$111,925	<b>\$146,225</b>
Responsive Requests	20	\$3,500	20	\$3,500	30	\$5,400	30	\$5,400	30	\$5,550	<b>\$23,350</b>
Subtotal	889	\$155,575	758	\$132,650	764	\$137,520	794	\$142,920	1395	\$258,075	<b>\$826,740</b>
Overhead (10%)		\$15,558		\$13,265		\$13,752		\$14,292		\$25,808	<b>\$82,674</b>
Total	889	\$171,133	758	\$145,915	764	\$151,272	794	\$157,212	1395	\$283,883	<b>\$909,414</b>

### IX. Invoice Due Dates

Service Period	Invoice Due Date	Invoice/Report Content
Quarter 1 July 1 – September 31	October 15	Invoice Services Provided and Billable Hours
Quarter 2 October 1 – December 31	January 15	Invoice Services Provided and Billable Hours
Quarter 3 January 1 – March 31	April 15	Invoice Services Provided and Billable Hours
Quarter 4 April 1 – June 30	July 7	Invoice Services Provided and Billable Hours

### X. Performance Measures

Performance Measures	Calendar Year Target
Deliverables completed on time	100%
Responses to inquiries within 8 business hours	100%
Partner satisfaction	100%
User-friendly and actionable reports	100%



# County of San Mateo

## Inter-Departmental Correspondence

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**Department:** PROBATION

**File #:** 25-981

Board Meeting Date: 11/18/2025

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**Special Notice / Hearing:** None  
**Vote Required:** Majority

**To:** Honorable Board of Supervisors

**From:** John T. Keene, Chief Probation Officer

**Subject:** Agreement with Applied Survey Research to Provide Research and Evaluation Services

### **RECOMMENDATION:**

Adopt a resolution authorizing the President of the Board of Supervisors to execute an agreement with Applied Survey Research to provide research and evaluation services for the San Mateo County Probation Department, for the term of January 1, 2026 through December 31, 2030, in an amount not to exceed \$909,414.

### **BACKGROUND:**

The San Mateo County Probation Department receives State juvenile justice funding from four primary programs:

- Youthful Offender Block Grant (YOBG)
- Juvenile Justice Crime Prevention Act (JJCPA)
- Juvenile Probation Activities Funding (JPFA)
- Juvenile Justice Realignment Block Grant (JJRBG)

These funds provide critical resources for prevention, intervention, supervision, and reentry programs that serve justice-involved and at-risk youth.

To maintain eligibility for these funds, the County is required to submit regular reports to the State and the Juvenile Justice Coordinating Council. Independent evaluation and monitoring of funded programs help ensure accountability, transparency, and continuous improvement of services for youth and families.

### **DISCUSSION:**

In July 2025, the Probation Department issued a Request for Proposals (RFP No. 2025-RFP-00559) for research and evaluation services. Applied Survey Research (ASR), a nonprofit organization with extensive experience in criminal justice and youth program evaluation, was selected through this competitive process.

Under this agreement, ASR will:

- Prepare annual Juvenile Services evaluation reports;
- Present findings to the Juvenile Justice Coordinating Council and community-based organizations;
- Provide data analysis to inform program and policy decisions; and
- Develop the 2030-2035 Local Action Plan, outlining countywide strategies for addressing juvenile crime.

The agreement will be funded through a combination of YOBG, JJCPA, JPAF, and JJRBG funding. No Net County Cost is associated with this item.

**PERFORMANCE MEASURE:**

<b>Performance Measures</b>	<b>Calendar Year Target</b>
Deliverables completed on time	100%
Responses to inquiries within 8 business hours	100%
Partner satisfaction	100%
User-friendly and actionable reports	100%

**COMMUNITY IMPACT:**

The Probation Department serves youth and families who are disproportionately impacted by the juvenile justice system, including youth of color, low-income families, and those with histories of trauma. Independent evaluation is a critical tool to ensure that programs and services are equitably accessible, culturally responsive, and effective.

Through this agreement, Applied Survey Research will collect and analyze data disaggregated by race, ethnicity, gender, and other relevant demographics to identify disparities in service delivery and outcomes. The findings will inform policy and practice changes, improve accountability, and support the development of the 2030-2035 Local Action Plan with an equity lens.

By embedding equity considerations into evaluation, the County will be better positioned to address systemic barriers and ensure that justice-involved youth and their families have fair and meaningful opportunities for success.

**FISCAL IMPACT:**

The term of this agreement is January 1, 2026, through December 31, 2030, for an amount not to exceed \$909,414. The Agreement will be fully funded by state resources.

**RESOLUTION NO. 081522**

**BOARD OF SUPERVISORS, COUNTY OF SAN MATEO, STATE OF CALIFORNIA**

\* \* \* \* \*

**RESOLUTION AUTHORIZING THE PRESIDENT OF THE BOARD OF SUPERVISORS TO EXECUTE AN AGREEMENT WITH APPLIED SURVEY RESEARCH TO PROVIDE RESEARCH AND EVALUATION SERVICES FOR THE SAN MATEO COUNTY PROBATION DEPARTMENT, FOR THE TERM OF JANUARY 1, 2026 THROUGH DECEMBER 31, 2030, IN AN AMOUNT NOT TO EXCEED \$909,414**

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**RESOLVED**, by the Board of Supervisors of the County of San Mateo, State of California, that

**WHEREAS**, the Probation Department seeks to enter into an agreement with Applied Survey Research (ASR) to provide research and evaluation services for programs funded by the Youth Offender Block Grant (YOBG), Juvenile Justice Crime Prevention Act (JJCPA), Juvenile Probation Activities Funding (JPAF), and Juvenile Justice Realignment Block Grant (JJRBG); and

**WHEREAS**, in July 2025, the Probation Department issued Request for Proposals (RFP No. 2025-RFP-00559) for research and evaluation services, and Applied Survey Research was selected through this process; and

**WHEREAS**, Applied Survey Research will deliver a range of services, including annual juvenile services evaluation reports, presentations to the Juvenile Justice Coordinating Council and community-based organizations, and the 2030 Local Action Plan report;

**NOW, THEREFORE, BE IT RESOLVED** that the President of the Board of Supervisors is hereby authorized and directed to execute the Agreement with Applied Survey Research, on behalf of the County of San Mateo, in the amount not to exceed \$909,414, for the term of January 1, 2026 through December 31, 2030, and the Clerk of the Board shall attest the President's signature thereto.

**BE IT FURTHER RESOLVED** that the Chief Probation Officer, or the Chief's designee, is authorized to exercise the County's contractual options and to execute amendments that do not exceed \$25,000 in aggregate, and/or modify the contract term and/or scope of services, provided that such modifications are consistent with the Agreement's current or revised fiscal provisions.

\* \* \* \* \*

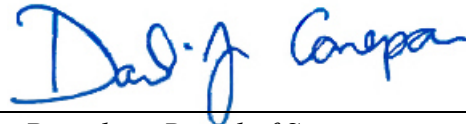
*Regularly passed and adopted this 18th day of November, 2025*

*AYES and in favor of said resolution:*

*Supervisors:* \_\_\_\_\_ *JACKIE SPEIER*  
\_\_\_\_\_ *NOELIA CORZO*  
\_\_\_\_\_ *RAY MUELLER*  
\_\_\_\_\_ *LISA GAUTHIER*  
\_\_\_\_\_ *DAVID J. CANEPA*

*NOES and against said resolution:*

*Supervisors:* \_\_\_\_\_ *NONE*



\_\_\_\_\_  
*President, Board of Supervisors  
County of San Mateo  
State of California*

***Certificate of Delivery***

*I certify that a copy of the original resolution filed in the Office of the Clerk of the Board of Supervisors of San Mateo County has been delivered to the President of the Board of Supervisors.*



\_\_\_\_\_  
*Deputy Clerk of the Board of Supervisors*

## Aggregate Scores Summary

Vendor	Paniz Amirn...	Paniz Amirn...	Nora Cullen	Jeremy Latta	Noelle Verg...	Total Score (Max Score 110)
Applied Sur...	-	92.1	97.1	94.1	96.1	<b>94.83</b>
Data In Acti...	-	74.1	81.1	61.1	67.1	<b>70.83</b>
RDA Consul...	-	86.2	89.2	84.2	77.2	<b>84.21</b>
Social Chan...	-	101.1	81.1	98.1	97.1	<b>94.4</b>
The Urban I...	-	98	84	97	92	<b>92.73</b>
TriWest Gro...	-	101	89	99	99	<b>97</b>

## Vendor Scores by Evaluation Criteria

Vendor	Project Appro Points Based 25 Points (22.7	Firm Qualifica Points Based 25 Points (22.7	Team Qualific Points Based 25 Points (22.7	Price Reward Low C 25 Points (22.7	Preferential P Reward Low C 10 Points (9.1%	Total Score (Max Score 110)
Applied Sur...	23.5	25	24.3	15.8	6.3	<b>94.83</b>
Data In Acti...	21.5	16.8	5.5	19.3	7.7	<b>70.83</b>
RDA Consul...	23	23.5	23.5	10.2	4.1	<b>84.21</b>
Social Chan...	22.8	22	22.5	19.4	7.8	<b>94.4</b>
The Urban I...	20.5	20.8	21.5	21.4	8.6	<b>92.73</b>
TriWest Gro...	19.8	21	21.3	25	10	<b>97</b>

## Individual Response Scores

### ∨ Applied Survey Research

Evaluation Item	Paniz Amirnasiri	Paniz Amirnasiri	Nora Cullen	Jeremy Latta	Noelle Vergara
<b>Project Approach</b> Points Based 25 Points (22.7%)	-	20	25	24	25

<b>Firm Qualification</b> Points Based 25 Points (22.7%)	-	25	25	25	25
<b>Team Qualificatio</b> Points Based 25 Points (22.7%)	-	25	25	23	24
<b>Price</b> Reward Low Cost 25 Points (22.7%)	-	15.77 (\$910,000)	15.77 (\$910,000)	15.77 (\$910,000)	15.77 (\$910,000)
<b>Preferential Point</b> Reward Low Cost 10 Points (9.1%)	-	6.31 (\$910,000)	6.31 (\$910,000)	6.31 (\$910,000)	6.31 (\$910,000)
<b>Total (Max Sc...</b>	-	<b>92.1</b>	<b>97.1</b>	<b>94.1</b>	<b>96.1</b>

∨ Data In Action, LLC

Evaluation Item	Paniz Amirnasiri	Paniz Amirnasiri	Nora Cullen	Jeremy Latta	Noelle Vergara
<b>Project Approach</b> Points Based 25 Points (22.7%)	-	25	18	23	20
<b>Firm Qualification</b> Points Based 25 Points (22.7%)	-	20	18	10	19
<b>Team Qualificatio</b> Points Based 25 Points (22.7%)	-	2	18	1	1
<b>Price</b> Reward Low Cost 25 Points (22.7%)	-	19.34 (\$741,819)	19.34 (\$741,819)	19.34 (\$741,819)	19.34 (\$741,819)
<b>Preferential Point</b> Reward Low Cost 10 Points (9.1%)	-	7.74 (\$741,819)	7.74 (\$741,819)	7.74 (\$741,819)	7.74 (\$741,819)
<b>Total (Max Sc...</b>	-	<b>74.1</b>	<b>81.1</b>	<b>61.1</b>	<b>67.1</b>

∨ RDA Consulting, SPC

Evaluation Item	Paniz Amirnasiri	Paniz Amirnasiri	Nora Cullen	Jeremy Latta	Noelle Vergara
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<b>Project Approach</b> Points Based 25 Points (22.7%)	-	24	25	22	21
<b>Firm Qualificatio</b> Points Based 25 Points (22.7%)	-	25	25	23	21
<b>Team Qualificatio</b> Points Based 25 Points (22.7%)	-	23	25	25	21
<b>Price</b> Reward Low Cost 25 Points (22.7%)	-	10.15 (\$1,413,685	10.15 (\$1,413,685	10.15 (\$1,413,685	10.15 (\$1,413,685
<b>Preferential Point</b> Reward Low Cost 10 Points (9.1%)	-	4.06 (\$1,413,685)	4.06 (\$1,413,685)	4.06 (\$1,413,685)	4.06 (\$1,413,685)
<b>Total (Max Sc...</b>	-	<b>86.2</b>	<b>89.2</b>	<b>84.2</b>	<b>77.2</b>

∨ Social Change Partners

Evaluation Item	Paniz Amirnasiri	Paniz Amirnasiri	Nora Cullen	Jeremy Latta	Noelle Vergara
<b>Project Approach</b> Points Based 25 Points (22.7%)	-	25	18	24	24
<b>Firm Qualificatio</b> Points Based 25 Points (22.7%)	-	24	18	23	23
<b>Team Qualificatio</b> Points Based 25 Points (22.7%)	-	25	18	24	23
<b>Price</b> Reward Low Cost 25 Points (22.7%)	-	19.39 (\$740,000)	19.39 (\$740,000)	19.39 (\$740,000)	19.39 (\$740,000)
<b>Preferential Point</b> Reward Low Cost 10 Points (9.1%)	-	7.76 (\$740,000)	7.76 (\$740,000)	7.76 (\$740,000)	7.76 (\$740,000)
<b>Total (Max Sc...</b>	-	<b>101.1</b>	<b>81.1</b>	<b>98.1</b>	<b>97.1</b>

∨ The Urban Institute

Evaluation Item	Paniz Amirnasiri	Paniz Amirnasiri	Nora Cullen	Jeremy Latta	Noelle Vergara
<b>Project Approach</b> Points Based 25 Points (22.7%)	-	22	18	21	21
<b>Firm Qualification</b> Points Based 25 Points (22.7%)	-	23	18	23	19
<b>Team Qualification</b> Points Based 25 Points (22.7%)	-	23	18	23	22
<b>Price</b> Reward Low Cost 25 Points (22.7%)	-	21.41 (\$670,131)	21.41 (\$670,131)	21.41 (\$670,131)	21.41 (\$670,131)
<b>Preferential Point</b> Reward Low Cost 10 Points (9.1%)	-	8.57 (\$670,131)	8.57 (\$670,131)	8.57 (\$670,131)	8.57 (\$670,131)
<b>Total (Max Sc...</b>	-	<b>98</b>	<b>84</b>	<b>97</b>	<b>92</b>

∨ TriWest Group LLC

Evaluation Item	Paniz Amirnasiri	Paniz Amirnasiri	Nora Cullen	Jeremy Latta	Noelle Vergara
<b>Project Approach</b> Points Based 25 Points (22.7%)	-	20	18	20	21
<b>Firm Qualification</b> Points Based 25 Points (22.7%)	-	23	18	22	21
<b>Team Qualification</b> Points Based 25 Points (22.7%)	-	23	18	22	22
<b>Price</b> Reward Low Cost 25 Points (22.7%)	-	25 (\$573,975)	25 (\$573,975)	25 (\$573,975)	25 (\$573,975)
<b>Preferential Point</b> Reward Low Cost 10 Points (9.1%)	-	10 (\$573,975)	10 (\$573,975)	10 (\$573,975)	10 (\$573,975)

<b>Total (Max Sc...</b>	<b>-</b>	<b>101</b>	<b>89</b>	<b>99</b>	<b>99</b>
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## **County of San Mateo**

### **Request for Proposals (RFP) for Research and Evaluation Services**

#### **Probation**

RFP No. 2025-RFP-00559

**RFP Contact:** Yanitxa Albino  
yalbino@smcgov.org

## **1. Introduction and Schedule**

### **1.1. Summary**

San Mateo County, located in the heart of the San Francisco Bay Area, is a diverse and dynamic region known for its innovative public services, strong community partnerships, and dedication to fairness and community well-being. Home to more than 740,000 residents, the county includes urban, suburban, and rural communities, each with unique needs and strengths.

The San Mateo County Probation Department plays a vital role in supporting community safety and individual rehabilitation by providing evidence-based supervision and services across juvenile and adult populations. The Department is seeking proposals from qualified research and evaluation firms to assist in assessing and improving the effectiveness of its programs, enhancing accountability, and advancing positive outcomes for justice-involved individuals and their communities.

The selected firm(s) will evaluate juvenile programs, funded through various grants, and operated by contracted community-based organizations. This includes producing annual reports for the County's Juvenile Justice Coordinating Council (JJCC), with a focus on program performance, measurable outcomes, and alignment with grant objectives to support data-driven decision-making and continuous improvement in juvenile services.

In addition, the firm(s) will provide consultation and technical assistance for the development of the 2030-2035 Local Action Plan, which will outline countywide strategies for addressing juvenile crime, and assist with updating the annual Juvenile Justice Realignment Block Grant (JJRBG) Plan, which focuses on services for youth who have committed serious offenses. Both efforts require facilitating a public engagement process in collaboration with the Department.

Finally, the firm(s) may be asked to conduct research and analysis on programs within the Adult and Pretrial Services Division. Through these combined efforts, the selected firm(s) will support the evaluation of programs and help shape future strategies to improve outcomes across Juvenile Services, and Adult and Pretrial Services.

### **1.2. Background**

The selected evaluation firm(s) will support the San Mateo County Probation Department in collecting and analyzing data from approximately 12 community-based organizations (CBOs) that receive state grant funding to deliver juvenile justice programs. These programs are supported through multiple funding streams, including the Youthful Offender Block Grant (YOBG), Juvenile Justice Crime Prevention Act (JJCPA), Juvenile Probation Activities Funding (JPAF) (*formerly referred to as Juvenile Probation Camp Funding*), and the Juvenile Justice Realignment Block Grant (JJRBG).

Oversight of these grants is provided by the Juvenile Justice Coordinating Council (JJCC), a multidisciplinary body established in 2000 pursuant to California Government Code §30061. The JJCC is responsible for developing and implementing strategies that address local juvenile justice needs and promoting effective use of funding for prevention and intervention programs.

The funded programs are evidence-based and/or promising practice, and services are offered in the community and at the Youth Services Center-Juvenile Hall (YSC), collectively serving more than 1,000 youth annually. These programs aim to reduce recidivism, improve youth outcomes, and address underlying needs through services such as mentoring, cognitive behavioral therapy, family support, education, and career readiness.

The firm(s) will also assist in the development and implementation of two key county planning efforts. The first is the five-year Local Action Plan (LAP), which serves as San Mateo County's strategic roadmap for juvenile crime prevention and intervention. The second is the annual update of the Juvenile Justice Realignment Block Grant (JJRBG) Plan, required under Senate Bill 823 (2020), which outlines

county-level programs, services, and facilities for youth who previously would have been eligible for commitment to the state's Division of Juvenile Justice (DJJ), which has since closed.

Additionally, firms/s will assist in the evaluation of programs in the Adult and Pretrial Services Division. Which may include but are not limited to: (1) the Community Corrections Partnership (CCP) Local Implementation Plan and (2) Pretrial services for individuals accused of violating the law and/or have criminal charges filed against them.

To ensure high-quality data collection and reporting, the selected firm(s) will maintain regular communication and provide technical assistance to funded CBOs. This partnership will support consistent data submission and allow the firm(s) to incorporate program performance and outcome data into comprehensive annual reports. These reports will be shared with the JJCC and the public to promote transparency, support data-informed decision-making, and drive continuous improvement across the juvenile justice system.

### 1.3. Contact Information

**Yanitxa Albino**

Management Analyst

Email: [yalbino@smcgov.org](mailto:yalbino@smcgov.org)

Phone: [\(650\) 400-3151](tel:(650)400-3151)

**Department:**

Probation

**Department Head:**

John T. Keene

Chief Probation Officer

### 1.4. Timeline

<b>RFP Released</b>	July 8, 2025
<b>Pre-Proposal Meeting (Non-Mandatory)</b>	July 16, 2025, 2:00pm Virtual Meeting - Microsoft Teams link to be provided. Please RSVP to <a href="mailto:yalbino@smcgov.org">yalbino@smcgov.org</a> by Tuesday, July 15, 2025
<b>Deadline for Questions, Comments and Contract Exceptions</b>	July 22, 2025, 5:00pm
<b>Proposal Due Date and Time</b>	August 12, 2025, 5:00pm
<b>Interviews (tentative)</b>	September 3, 2025

<b>Anticipated Contract Award Date</b>	November 18, 2025
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**2. Scope of Work**

**2.1. Program Evaluation & Reporting**

- A. Under Probation’s guidance, assess the effectiveness of juvenile programs operated by community-based organizations under contract with the department.
- B. Collect and analyze quantitative and qualitative data from approximately 12 community-based organizations receiving JJCPA, JPAF, YOBG, JIRBG, and other funding, including:
  - 1. Program dosage
  - 2. Demographics of clients served
  - 3. Relevant outcomes based on established performance measures
  - 4. Program strengths and challenges
  - 5. Client success stories
- C. Assist with the creation of surveys to collect data as needed
- D. Communicate directly with community-based organizations and provide technical assistance, including:
  - 1. Quality data collection
  - 2. Evidence-based assessment tools
- E. Under Probation’s guidance, produce two annual reports and develop presentation materials for the Juvenile Justice Coordinating Council (JJCC):
  - 1. Report 1: Focus on YOBG and JIRBG programs
  - 2. Report 2: Focus on JJCPA and JPAF programs
- F. Reports should be clear, easy to read, and aimed at the public, highlighting relevant data and outcomes to support data-driven decision-making and continuous improvement in juvenile services.

*Examples of past reports: [Juvenile Justice Coordinating Council Annual Reports | County of San Mateo, CA](#)*

**2.2. Local Action Plan (LAP) Development**

- A. Serve as the department’s consultant for developing and drafting the County’s 2030-2035 Local Action Plan, outlining countywide strategies for addressing juvenile crime. The plan should include the following elements:

1. Assessment of local resources serving at-risk youth and juvenile offenders
  2. Identification of high-risk areas in the community
  3. A collaborative and integrated juvenile justice action strategy
  4. Information-sharing strategies and performance measures
  5. Data systems assessment; including data tracking, accountability and oversight
  6. Optional elements such as target population and rehabilitation goals
  7. Identification of major challenges to implementation and recommendations for addressing them
- B. Collect stakeholder input as part of the LAP development process. Facilitate stage-setting listening sessions with the JJCC, Probation Leadership, and funded CBOs. Conduct interviews with stakeholders and service providers. Analyze and synthesize data.

*For reference, see link to the current*

*LAP: <https://www.smcgov.org/media/154312/download?inline=>*

### **2.3. Evaluation of Existing Resources**

- A. Assessment of existing services for the Probation Department Divisions including, Juvenile Services, Institutions, Adult and Pretrial Services.
- B. Evaluation of resources targeted to the Probation Department's clients and people at risk in the community including but not limited to programs for:
1. Law enforcement and Probation
  2. Education
  3. Mental health
  4. Health
  5. Social Services
  6. Drugs and alcohol
  7. Batterers intervention
- C. Development and annual update of Probation's Resources Guide for Youth and Their Families

*For reference, see link to the current resource guide: <https://www.smcgov.org/probation/resource-guide-youth-and-their-families>*

**2.4. Juvenile Justice Crime Prevention Act (JJCPA) and Youthful Offender Block Grant (YOBG) Program**

- A. Assist as needed in developing the County’s annual JJCPA and YOBG Annual Plan. The plan describes the programs, placements, strategies, services, and system enhancements supported by JJCPA and YOBG funds.

*Link to County’s JJCPA-YOBG plans: <https://www.bscc.ca.gov/2023-2024-county-jjcpa-yobg-plans/>*

**2.5. Juvenile Justice Realignment Block Grant (JJRBG) Plan**

- A. Assist in developing the County’s annual JJRBG Plan, detailing programs, and services for serious youth offenders
- B. Facilitate the public process in collaboration with Probation

**2.6. Adult and Pretrial Services Research & Analysis**

- A. Conduct research and analysis related to Adult and Pretrial Services Division programs including but not limited to:
  - 1. The Community Corrections Partnership (CCP) Local Implementation Plan
  - 2. Pretrial services for individuals accused of violating the law and/or have criminal charges filed against them

*Link to County’s CCP plans: [https://www.bscc.ca.gov/s\\_communitycorrectionspartnerhipplans/](https://www.bscc.ca.gov/s_communitycorrectionspartnerhipplans/)*

**2.7. Meetings & Collaboration**

- A. Meet monthly with Probation staff to review ongoing work related to the tasks above.
- B. Attend JJCC meetings (quarterly), CBO meetings (quarterly), and JJCC Realignment Subcommittee meetings (generally two or three per year).

**3. Submission Requirements**

**3.1. Submission Deadline**

Proposals must be electronically received by 5:00 pm, on Tuesday, August 12, 2025 via eProcurement system.

Allow sufficient time for the upload to complete by the Due Date and Time. Partial uploads will automatically terminate, and proposals will be rejected. The eProcurement system submission time will be the official submission time. The County will not be responsible for and may not accept proposals that are late due to slow internet connections or for any other failure of the eProcurement system.

NOTE: The County does not maintain the eProcurement system and is not liable for site failures or technical problems. To resolve technical issues, contact OpenGov Technical Support by using the real time chat located in the lower right hand corner of the screen, or via email at [procurement-support@opengov.com](mailto:procurement-support@opengov.com)

<https://procurement.opengov.com/portal/smcgov>

### **3.2. Pre-submission Registration**

Organizations or individuals interested in responding to this solicitation must register online with the County of San Mateo at:

- <https://procurement.opengov.com/portal/smcgov>

It is recommended that organizations complete this registration as soon as possible. The County will not be responsible for and may not accept proposals that are late due to a failure to register in the eProcurement system.

### **3.3. Submission via eProcurement Portal**

#### **Required Documents**

Please refer to the [Technical Proposal](#) section for submittal documents and requirements.

#### **Electronic Submissions**

Include the proposer name and the RFP title and number in each filename. Submit proposals via the eProcurement website, allowing sufficient time for the upload to complete by the Due Date and Time. As noted above, the eProcurement portal submission time will be the official submission time, and partial uploads will automatically terminate, and proposals will be rejected. Contact eProcurement Portal with technical questions regarding this site.

#### **Conflicts between Certain Requirements**

Prior to the submission deadlines and solely relating to a determination of the timeliness of questions, comments, and proposal submissions, information displayed on the eProcurement portal site will take precedence in the event of a discrepancy between that information and the information within the solicitation documents. For all other discrepancies, the information in the solicitation documents will take precedence.

#### **Format**

Documents should be created in the following format:

- Text should be Times New Roman (12-point minimum font size) and unjustified (i.e., with a ragged-right margin)
- Pages should have margins of at least one inch on all sides (excluding headers and footers)
- If the proposal is lengthy, a Table of Contents should be included.
- PDF format is preferred.

#### **Errors in Proposals**

The County will not be liable for any errors in proposals. Proposals may be rejected as unresponsive if they are late, incomplete, missing pages or information, or cannot be opened for any reason. The County may waive minor irregularities, but such waiver will not modify any remaining RFP requirements.

#### **4. Minimum Qualifications and Technical Proposal**

##### **4.1. Minimum Qualifications**

**4.1.1. Has the Proposer been providing similar services for a minimum of four (4) years within the last seven (7) years?\***

- Yes  
 No

\*Response required

**4.1.2. Does the program manager have a minimum of two (2) years of experience within the last five (5) years in managing programs of this size?\***

- Yes  
 No

\*Response required

**4.1.3. Please confirm your firm is registered with System for Award Management (SAM)\***  
[SAM.gov](https://www.sam.gov)

- Please confirm

\*Response required

**4.1.4. What is the registered Business Name and Unique Entity ID (UEI) No.??\***

- UEI number can be obtained by registering your business through SAM.GOV
- Should you be in the process of obtaining your UEI number, please enter the digits '123' temporarily for your response below in order to proceed with proposal. This temporary number should be replaced with the correct registration number for submission of the proposal.

\*Response required

##### **4.2. Technical Proposal**

###### **4.2.1. Introduction and Executive Summary \***

Submit a letter of introduction and executive summary of the proposal. The letter must contain:

- Name, title and contact information (email, phone, and address) for representative of proposer that is responsible for communication related to this RFP.
- Name, title, contact information, and signature of person authorized to obligate firm to perform the commitment contained in the proposal.

Submission of the letter will constitute a representation by proposer that it is willing and able to perform the commitments contained in the proposal and has not violated the terms of this RFP.

\*Response required

**4.2.2. Statement of Minimum Qualifications \***

Describe how the proposer meets the minimum qualifications as set forth in **Minimum Qualifications** of this RFP.

Submission of the Minimum Qualifications checklist is not a substitute for providing a detailed written response.

\*Response required

**4.2.3. Project Approach\***

This section should correlate to the Scope of Work . Proposer should give a short summary describing how it will perform the relevant work

\*Response required

**4.2.4. Scope of Work tasks/milestones\***

Describe your proposed approach to tasks/milestones

\*Response required

**4.2.5. Proposed schedule \***

Attach proposed schedule reference ability to complete the project within the County's required time frame

\*Response required

**4.2.6. Innovations\***

Refence any notable innovations or improvements that you expect to provide (with respect to, for example, efficiency, technology, sustainability)

\*Response required

**4.2.7. Performance Measures\***

Describe a plan for achieving performance measures

\*Response required

**4.2.8. Firm Qualifications \***

Attach information regarding background and qualifications, including the following:

- A brief description of the proposer.
- A description of not more than three (3) projects similar in size and scope conducted by the proposer, including the client, reference and telephone numbers, primary staff members involved, budget, schedule, and project summary. Descriptions should be limited to one (1) page for each project.
- If subcontractors are anticipated, identify them (if known) and provide information on how they will be used.

\*Response required

**4.2.9. Team Qualifications\***

Provide a chart identifying:

- Project team and reporting structure
- Lead project manager
- Role each person will play in the project

Provide a brief description of the experience and qualifications of the project team members, including short resumes if desired.

Written assurance that the key individuals listed and identified will be performing the work and will not be substituted or reassigned without the County’s prior approval

\*Response required

**4.2.10. References\***

Provide 2 references for each of the following, including the name, position/title, address, email, and telephone number of recent clients (preferably other public agencies):

\*Response required

**4.2.11. Fee Proposal\***

The Fee Proposal should be submitted as a separate PDF file from the Technical Proposals detailed in Required Documents.

The County reserves the right to accept other than the lowest priced offer and to reject any proposals that are not responsive to this request.

\*Response required

**5. Evaluation and Selection Criteria**

The proposals will be evaluated by a selection committee with relevant expertise. The County intends to evaluate the proposals generally in accordance with the criteria itemized below. Proposers with the highest scoring proposals may be interviewed by the committee to make the final selection.

No.	Evaluation Criteria	Scoring Method	Weight (Points)
1.	<b>Project Approach</b>	Points Based	25 <i>(25% of Total)</i>
2.	<b>Firm Qualifications</b>	Points Based	25 <i>(25% of Total)</i>
3.	<b>Team Qualifications</b>	Points Based	25 <i>(25% of Total)</i>

4.	<b>Price</b>	Reward Low Cost	25 <i>(25% of Total)</i>
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**6. Instructions to Proposers**

**6.1. Instructions**

Proposers are encouraged to attend a pre-proposal conference on Wednesday, July 16, 2025, at 2:00 pm, to be held at Virtual Meeting - Microsoft Teams link to be provided. Please RSVP to yalbino@smcgov.org by Tuesday, July 15, 2025. All questions will be addressed at this conference and any available new information will be provided at that time. If you have further questions regarding the RFP, please post them on the eProcurement portal.

**6.2. Communications**

- A. As of the issuance date of this RFP and continuing until it is canceled or an award is made, no proposer or person acting on behalf of a prospective proposer may discuss any matter relating to the RFP with any officer, agent, or employee of the County, other than through eProcurement portal, to the Authorized Contact Person, or as outlined in the evaluation or protest procedures.
- B. Proposers (including any agent, owner, employee, board members, or other such affiliates) shall not offer any gift, favor, or other personal benefit to any County officer or employee during the procurement process for this agreement, including during the solicitation period and contract negotiations.

Violation of the foregoing prohibitions may result in a proposer being found non-responsible and barred from participating in this or future procurements.

**6.3. Contract Award**

**A. Award Procedure**

One or more contracts from different bidders may be awarded as a result of this RFP. Contract negotiations are neither an offer nor guarantee that a contract will be executed. A contract award, if any is made, will be to the responsive, responsible proposer offering the overall best value to the County for the services and goods described in this solicitation, or as applicable, for a specific portion of the services and goods described. Any agreement reached will be memorialized in a formal agreement using the attached template, executed by the appropriate authority.

**B. Notice of Intent to Award**

If a decision is made to take steps to enter into an agreement with one or more proposers, the County will post a Notice of Intent to Award or otherwise notify proposers the remaining proposers of their non-selection. Notice may instead be provided by including approval of the agreement as an item on an agenda for a meeting of the Board of Supervisors.

**C. Commencement of Performance**

After all parties have signed the agreement, the County will notify the contractor and performance may proceed. Prior to execution of the agreement by the County, no County

employee may authorize work under the agreement. Any work performed prior to the full execution of the Agreement may not be compensated.

#### **6.4. Term**

Probation is issuing Request for Proposal (RFP) No. 2025-RFP-00559 for Research and Evaluation Services.

The agreement shall have a Term of five (5) years. The County's standard contract template has been included with this solicitation. The awarded contractor will be expected to sign an agreement prepared by the County using this template. Please ensure that your firm has completed legal review of these contract terms. If your firm wishes to request exceptions to these standard terms, submit a Contract Exceptions Request by the Deadline for Questions, Comments and Contract Exceptions listed in the Solicitation Schedule below. The County will consider Contract Exceptions Requests but reserves the right to reject requested modifications to its standard terms.

### **7. Terms and Conditions for Receipt of Proposals**

#### **7.1. Errors, Omissions and Inquiries regarding the RFP**

Proposers are responsible for reviewing all portions of this RFP. Proposers are to notify the department, in eProcurement portal, if the proposer discovers any ambiguity, discrepancy, omission, or apparent error in the RFP. Such notification should be made promptly after discovery, but in no event later than five business days prior to the deadline for receipt of proposals. Modifications and clarifications will be made by addenda as provided below.

Inquiries regarding the RFP should be lodged in eProcurement portal.

#### **7.2. Objections to RFP Terms**

Should a proposer object on any ground to any provision or legal requirement set forth in this RFP, the proposer must, not more than ten calendar days after the RFP is issued, provide written notice to the department, via eProcurement portal, setting forth with specific grounds for the objection.

#### **7.3. Addenda**

The County may cancel, revise, or reissue this RFP, in whole or in part, for any reason. Revisions will be posted as Addenda on eProcurement portal. No other revision of this RFP is valid. Proposers shall be responsible for ensuring that their proposals reflects any and all Addenda issued by the County prior to the proposal due date regardless of when a proposal is submitted. Therefore, the County recommends that proposers consult eProcurement portal frequently, including shortly before the proposal due date, to confirm that all Addenda have been downloaded.

#### **7.4. Term of Proposal**

Submission of a proposal signifies that the proposed services and prices are valid for the duration of the proposed agreement term and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

### **7.5. Revision or Withdrawal of Proposal**

A proposer may revise a proposal on the proposer's own initiative at any time before the deadline for submission of proposals. The proposer must submit the revised proposal in the same manner as the original on or before the proposal due date.

A proposer may withdraw a proposal at any time before the deadline for submission of proposals. After that time, whether or not a new RFP is issued for the same subject matter, withdrawal of a proposal may preclude the proposer from participating in the procurement as a proposer or subcontractor, except that an original equipment manufacturer may participate indirectly through a reseller.

### **7.6. Errors and Omissions in Proposal**

The County will not be liable for any errors in proposals. Proposals may be rejected as unresponsive if they are incomplete, are missing pages or information, or cannot be opened for any reason. The County may waive minor irregularities, but such waiver will not modify any of the remaining RFP requirements.

### **7.7. No Commitment**

Neither submission of a proposal nor the County's receipt of proposal materials confers any right to the proposer nor any obligation on the County. This RFP does not commit the County to award a contract.

### **7.8. Financial Responsibility**

The County shall have no financial responsibility for any costs incurred by a firm in responding to this RFP or participating in any presentations or negotiations.

### **7.9. Estimated Quantity**

If the RFP results in an indefinite quantity or a requirements agreement, the goods and services actually requested by the County may be less than the maximum value of the agreement and there is no guarantee, either expressed or implied, as to the actual quantity of goods and services that will be authorized under the agreement.

### **7.10. Public Record**

#### **A. General**

1. All proposals, protests, and information submitted in response to this solicitation will become the property of the County and will be considered public records. As such, they may be subject to public review.
2. Any contract arising from this RFP will be a public record.
3. The County is not seeking proprietary information and will not assert any privileges that may exist on behalf of the proposer.
4. Submission of any materials in response to this RFP constitutes:
  - Consent to the County's release of such materials under the Public Records Act without notice to the person or entity submitting the materials; and

- Waiver of all claims against the County and/or its officers, agents, or employees that the County has violated a proposer's right to privacy, disclosed trade secrets, or caused any damage by allowing the proposal or materials to be inspected; and
- Agreement to indemnify and hold harmless the County for release of such information under the Public Records Act; and
- Acknowledgement that the County will not assert any privileges that may exist on behalf of the person or entity submitting the materials.

#### **7.11. Reservations of Rights by the County**

The issuance of this RFP does not constitute an agreement by the County that any contract will actually be entered into by the County. The County expressly reserves the right at any time to:

- Waive or correct any defect or informality in any response, proposal, or proposal procedure;
- Reject any or all proposals;
- Reissue an RFP;
- Prior to submission deadline for proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this RFP, or the requirements for contents or format of the proposals;
- Procure any materials, equipment or services specified in this RFP by any other means; or
- Determine that no project will be pursued.

#### **7.12. No Waiver**

No waiver by the County of any provision of this RFP shall be implied from any failure by the County to recognize or take action on account of any failure by a proposer to observe any provision of this RFP.

#### **7.13. Cooperative Agreement (Piggyback)**

This competitive solicitation is being conducted as a Cooperative Procurement. The services, terms and conditions of any agreement resulting from this solicitation may be used by other organizations as a Cooperative Agreement.

This provision in no way commits any affiliate to procure services from any awarded contractor, nor does it guarantee that any additional orders will result. At their discretion, and subject to their own procurement policies, interested organizations may make use of this competitive procurement and contract directly from the awarded contractor.

### **8. Protest Procedures**

### **8.1. Protest of Non-Responsiveness Determination**

Within five (5) working days of the County's issuance of a notice of non-responsiveness, any firm that has submitted a proposal and believes that the County has incorrectly determined that its proposal is non-responsive may submit a written notice of protest. Such notice of protest must be received by the County on or before the fifth working day following the County's issuance of the notice of non-responsiveness. The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the County to determine the validity of the protest.

### **8.2. Protest of Contract Award**

Within five (5) working days of the County's issuance of a notice of intent to award the contract, any firm that has submitted a responsive proposal and believes that the County has incorrectly selected another proposer for award may submit a written notice of protest. Such notice of protest must be received by the County on or before the fifth working day after the County's issuance of the notice of intent to award.

The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the County to determine the validity of the protest.

### **8.3. Delivery of Protests**

All protests must be received by the due date. If a protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein. Protests should be transmitted by a means that will objectively establish the date the County received the protest. Protests or notice of protests made orally (e.g., by telephone) will not be considered. Protests must be delivered to:

Protests@smcgov.org

Subject: Research and Evaluation Services, 2025-RFP-00559



County of San Mateo

## Probation

John T. Keene, Chief Probation Officer

400 County Center, Redwood City, CA 94063

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### [APPLIED SURVEY RESEARCH] RESPONSE DOCUMENT REPORT

RFP No. 2025-RFP-00559

Research and Evaluation Services

RESPONSE DEADLINE: August 12, 2025 at 5:00 pm

Report Generated: Wednesday, August 13, 2025

### Applied Survey Research Response

#### CONTACT INFORMATION

**Company:**

Applied Survey Research

**Email:**

[kim@appliedsurveyresearch.org](mailto:kim@appliedsurveyresearch.org)

**Contact:**

Kim Carpenter

**Address:**

55 Penny Lane

STE 101

Watsonville, CA 95077

**Phone:**

N/A

**Website:**

<https://www.appliedsurveyresearch.org/>

**Submission Date:**

Aug 12, 2025 4:43 PM (Pacific Time)

## ADDENDA CONFIRMATION

Addendum #1

*Confirmed Aug 8, 2025 8:04 PM by Kim Carpenter*

## QUESTIONNAIRE

### 1. Minimum Qualifications

HAS THE PROPOSER BEEN PROVIDING SIMILAR SERVICES FOR A MINIMUM OF FOUR (4) YEARS WITHIN THE LAST SEVEN (7) YEARS?\*

Yes

DOES THE PROGRAM MANAGER HAVE A MINIMUM OF TWO (2) YEARS OF EXPERIENCE WITHIN THE LAST FIVE (5) YEARS IN MANAGING PROGRAMS OF THIS SIZE?\*

Yes

PLEASE CONFIRM YOUR FIRM IS REGISTERED WITH SYSTEM FOR AWARD MANAGEMENT (SAM)\*

[SAM.gov](https://sam.gov)

Confirmed

WHAT IS THE REGISTERED BUSINESS NAME AND UNIQUE ENTITY ID (UEI) NO.?\*

- UEI number can be obtained by registering your business through SAM.GOV
- Should you be in the process of obtaining your UEI number, please enter the digits '123' temporarily for your response below in order to proceed with proposal. This temporary number should be replaced with the correct registration number for submission of the proposal.

KCM1PCENJ1A5

## 2. Procurement Preference for Local Businesses and Local Non-Profits

IS THE PROPOSER A "LOCAL BUSINESS"?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code, a "Local Business" means any for-profit business which has its principal place of business, or is headquartered, in San Mateo County. If this designation applies to the proposer, a self-attestation form must be completed and provided with this response.

Please download the below documents, complete, and upload. If this designation is not applicable, please leave blank.

- [SMC LocalBusiness self-atte...](#)

No response submitted

IS THE PROPOSER A NON-PROFIT?\*

A Non-Profit is defined as a tax-exempt public charity organization (within the meaning of section 501(c)(3) of the Internal Revenue Code) that is formed for purposes other than making a profit, is exempt from paying federal income taxes on the income generated for their exempt purposes.

Yes

IS THE PROPOSER A "LOCAL NON-PROFIT"

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code, a "Local Non-Profit" means a tax-exempt public charity organization (within the meaning of section 501(c)(3) of the Internal Revenue Code) that is formed for purposes other than making a profit, is exempt from paying federal income taxes on the income generated for their exempt purposes, and has its principal place of business, or is headquartered, in San Mateo County. If this designation applies to the proposer, a self-attestation form must be completed and provided with this response.

Please download the below documents, complete, and upload. If this designation is not applicable, please leave blank.

- [SMC LocalBusiness self-atte...](#)

No response submitted

IS THE PROPOSER A LOCAL "SMALL" OR "MICRO" BUSINESS?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code:

“Small Business” means any business which holds a Small Business Certification awarded by the California Office of Small Business and Disabled Veteran Business Enterprise Services (OSDS).

“Micro Business” means any Small Business certified by the OSDS which is automatically designated by the OSDS as a Micro Business due to gross annual receipts falling below the OSDS-designated dollar amount.

If the above designations apply, please provide the OSDS provided Certification ID.

If this designation is not applicable, please leave blank.

No response submitted

IS THE PROPOSER A LOCAL "SMALL" OR "MICRO" NON-PROFIT?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code:

“Small Non-Profit” means a Local Non-Profit with an annual revenue of \$1,000,000 to \$2,500,000 according to its most recently filed IRS Form 990.

“Micro Non-Profit” means a Local Non-Profit with an annual revenue of less than \$1,000,000, according to its most recently filed IRS Form 990.

If the above designations apply, please provide your latest filed IRS form 990. A filing from the last two calendar years is acceptable.

If this designation is not applicable, please leave blank.

No response submitted

### **3. Technical Proposal**

INTRODUCTION AND EXECUTIVE SUMMARY \*

Submit a letter of introduction and executive summary of the proposal. The letter must contain:

- Name, title and contact information (email, phone, and address) for representative of proposer that is responsible for communication related to this RFP.
- Name, title, contact information, and signature of person authorized to obligate firm to perform the commitment contained in the proposal.

Submission of the letter will constitute a representation by proposer that it is willing and able to perform the commitments contained in the proposal and has not violated the terms of this RFP.

ASR\_RFP\_No.\_2025-RFP-00559\_-\_Research\_and\_Evaluation\_Services\_-\_Executive\_Summary.pdf

ASR\_RFP\_No.\_2025-RFP-00559\_-\_Research\_and\_Evaluation\_Services\_-\_3.1\_Cover\_Letter.pdf

#### STATEMENT OF MINIMUM QUALIFICATIONS \*

Describe how the proposer meets the minimum qualifications as set forth in **Minimum Qualifications** of this RFP.

Submission of the Minimum Qualifications checklist is not a substitute for providing a detailed written response.

#### Service Qualifications

Because of ASR's decades-long commitment to providing similar services as requested in this RFP, we not only meet the minimum qualifications, but we far exceed them. This supports our success in partnering with San Mateo County Probation over the next five-year cycle.

Since its inception in 1980, the nonprofit social research firm ASR has helped communities make data-informed decisions to drive positive change. ASR has partnered with many county-level organizations to support vulnerable youth, including conducting successful evaluation projects with San Mateo County Probation since 2008. Other similar partner organizations within the last seven years include: San Mateo County Human Services Agency, the South County Youth Task Force through Santa Clara County Behavioral Health, and county juvenile probation departments of Marin, Riverside, Santa Clara, Santa Cruz, San Mateo, and Ventura. ASR also recently partnered with the Office of Youth and Community Restoration (OYCR) to prepare the 2025 DJJ Realignment Report on the impact of juvenile justice realignment across the state. ASR's justice system evaluations with the adult population in the Bay Area include leading Solano County Probation Department's strategic planning efforts, evaluating all of Santa Cruz County's Prop 47 grants, and analyzing Santa Cruz County Sheriff's Office Women's Recovery and Reentry Program (WRRP) for the prior 2021-2024 cycle and current 2024-2027 grant cycle. This program addresses the high rate of substance use disorder (SUD) in Santa Cruz County through

gender-specific, evidence-based efforts to reduce relapse and recidivism in women experiencing incarceration, with continuity of care designed to extend beyond incarceration and into the community through expanded aftercare support.

### **Program Manager Qualifications**

**Kim Gillette, M.P.H., Senior Project Manager at ASR.** Kim G. will continue as the **Project Lead/Manager**, bringing over 20 years of experience managing nonprofit and government programs, with expertise in program development, evaluation, fundraising, and cross-sector collaboration, with a focus on youth development. For the past four years, she has led the San Mateo County Probation Comprehensive Annual Evaluation Reports project and also currently manages the Riverside County Probation Department Juvenile Justice Plan community engagement process, and Community Health Needs Assessments for Kaiser Permanente, Sutter Health, and NorthBay Health where she oversees data collection, analysis, reporting, and partner communication. Previously, as Director of the Daly City Youth Health Center, she managed operations and a 25-member team delivering primary care, behavioral health, education, and vocational programs to low-income youth, while actively engaging in countywide behavioral health and contractor collaboration initiatives. She holds an M.P.H. in Health Behavior & Health Education from the University of Michigan, Ann Arbor, and a B.A. in Psychology from the University of California, Berkeley.

### **PROJECT APPROACH\***

This section should correlate to the Scope of Work . Proposer should give a short summary describing how it will perform the relevant work

ASR intends to apply and build upon our deep knowledge, trusted partnerships with San Mateo County Probation and CBOs, our experience with similar projects in other counties, and best practices in designing and implementing the evaluation activities specified by San Mateo Probation’s RFP solicitation. ASR is familiar with the needs to be met by organizations funded via the JJCPA, JPAF, YOBG, and JIRBG funding streams, the reporting requirements, and the processes for delivering products that Juvenile Justice Coordinating Committees have valued. We have drawn upon our past successes with San Mateo, Riverside, Santa Clara, and Santa Cruz Probation Departments and many other evaluations to inform and shape our proposed plan and approach for the next cycle of evaluation work in calendar years 2026 through 2030.

We propose to utilize qualitative and quantitative evaluation methods, build evaluation tools, plans, and resource guides, all while prioritizing relationship building, [equity](#), and making impactful changes. The two scopes of work ASR proposes include one for Juvenile Services and one for Adult Services. As a broad overview, for **Juvenile Services**, ASR’s work is anticipated to include:

- A. **Engage in regular [meetings](#) and collaboration** to stay updated and on track with tasks and major deliverables.
- B. **Update annual plans** through facilitation of discussions, accurately reflecting feedback, and finalizing the plans.
- C. **Deliver program evaluation & annual reports**, including technical assistance to CBOs, support of data systems, collection and analysis of program evaluation data, preparation of reports, and presentation of findings.
- D. **Evaluate existing resources** by updating the Youth and Family Resource Guide annually in 2026-2029, and a complete reorganization in 2030 to align with the new Local Action Plan.
- E. **Conduct a Local Action Plan** process with comprehensive community engagement, data collection, and analysis, utilizing a Results-Based Accountability framework to facilitate partner collaboration, establish performance measures, and create an interactive online dashboard to track progress and drive coordinated, data-informed action across the county.
- F. **Determine responsive request** priorities to support ad hoc evaluation requests as needed for Juvenile Services.

For **Adult Services**, ASR's work is anticipated to include:

- A. **Engage in regular [meetings and](#) collaboration** to stay updated and on track with tasks and major deliverables.
- B. **Update the CCP Annual Plan** through facilitation of discussions, accurately reflecting feedback, and finalizing the plans.
- C. **Evaluate existing resources** for adults by creating and updating an Adult Resource Guide in year one, with annual updates thereafter.
- D. **Determine responsive request** priorities to address emerging evaluation needs for Adult Services.

ASR deeply values and centers equity as a foundation of our work and is committed to doing no harm through our work to improve communities. Bias and systemic racism are ingrained in all of us, and ASR has collectively committed to carrying out ongoing reflection to identify where and how it is impacting our work. As a reflection of our commitment to promote equity in all aspects of our work, we have created an *Equity in Practice Checklist* of specific approaches and strategies we take to advance equity and eliminate bias in our research. Central to our mission is the unwavering commitment to equity, diversity, inclusion, belonging, justice, and anti-racism. These values are integral to achieving holistic well-being and are deeply embedded in our research and evaluation practices and mindsets.

#### SCOPE OF WORK TASKS/MILESTONES\*

Describe your proposed approach to tasks/milestones

ASR's scope of work is separated into Juvenile Services and Adult Services, with the scope of Pretrial Services to be determined later. As ASR is already familiar with the San Mateo County Probation team, programs, and CBO partnerships for juvenile services, thus no time is allocated for orientation and start-up. Time to orient to Adult Services is included in the scope of work.

#### Juvenile Services

The **Juvenile Services** activities are separated into six categories of work.

**1) Meetings & Collaboration.** ASR proposes to facilitate monthly online meetings with Probation staff, attend quarterly CBO and JJCC meetings, and provide prompt communication to address needs between meetings for the full term of the contract. Maintaining regular communication with Probation staff, CBOs, and the JJCC as needed will ensure that ASR stays informed on the evolving landscape of juvenile services and addresses emergent needs, while also facilitating opportunities to enlist support for evaluation activities and share key findings.

**2) Update Annual Plans.** ASR has partnered with Probation to facilitate the JIRBG Annual Plan process for the last two years, thus we propose to continue this process for the JIRBG Annual Plan updates and follow a similar process for developing and updating the JJCPA and YOBG Annual Plan. The JIRBG process that we propose will include familiarizing ourselves with the plan updates, clearly communicating those updates to the JJCC and the Realignment Committee, facilitating a review process to receive and incorporate feedback from participants on the plan, and holding a vote to approve the plan. The JJCPA and YOBG Plan will follow the same process with additional time for plan development in the first contract year (2026).

**3) Program Evaluation & Annual Reports.** Activities included in this category encompass supporting CBOs in their program evaluation responsibilities, improving and maintaining data systems, collecting program evaluation data, populating two reports, and presenting findings to CBO partners and to the JJCC.

Providing technical assistance is critical to collecting quality data with the CBOs and Probation, including providing clarity on required data elements. Currently, ASR creates and updates CBO evaluation data collection plans in the form of Excel workbooks for each CBO to complete. ASR provides these to the CBOs along with training on how to use them at the beginning of the fiscal year to ensure everyone is on the same page about the evaluation information needed throughout the year. ASR then collects the completed workbooks at the end of that year. These workbooks make it easier for the CBOs to enter in one place all the needed information,

such as program dosage (e.g., the hours each youth spent in their program), youth demographics, contracted performance measure outcomes, program strengths and challenges, youth success stories, and applied evidence-based practices. ASR proposes to continue this process of organized data collection and staff training. As needed, ASR will assist with finding evidence-based assessment tools or the creation of evaluation tools (e.g., surveys) for Probation programs and CBOs.

ASR proposes to enhance sensitive data management by streamlining secure data entry for CBOs and Probation through platforms such as SharePoint and/or Smartsheet. This approach will increase protection of confidentiality. Additional hours are included in the first year to create the tool(s) and orient CBOs and Probation staff on how to use it. More information can be found in the Innovations section.

Included in our scope of work is collecting, performing quality checks, and analyzing quantitative and qualitative data from Probation and CBOs to ensure reported data are accurate and complete. This includes comparing data from all CBOs to deduplicate youth, analyzing participant information by comparing demographics and usage across funding streams and services. ASR also evaluates if the CBOs met their performance measures as stated in their contract and checks research clearinghouses to validate the use of evidence-based tools.

ASR includes in our scope of work the preparation of two annual reports by funding stream: JJRBG/YOBG and JJCPA/JPAF. The reports will be clear and easy to read and comprehensive to inform Probation and its partners on the youth served under these funding streams. This will include conducting a detailed analysis of Ohio Youth Assessment System (OYAS) results, a tool recently adopted as a standard measure of youths' criminogenic risk, life functioning, and other areas of needs and strengths. When Probation began to train their team on this new tool, ASR staff also attended the training and have extensive knowledge of its uses and how to evaluate it.

As per available reporting guidelines and the needs of Probation and the JJCC, we propose that the reports cover the following topics, which, as noted, will vary slightly depending on funding stream, and align with past reports:

- Executive Summary
- Background information about the LAP goals (JJCPA/JPAF only) and funding streams
- Evaluation Design and Methodology that includes desired outcomes, evaluation tools, and data collection methods
- Evaluation Findings that include:
  - Youth profile (numbers of youth by program and funding stream, youth race/ethnicity, gender, age, city of residence)

- Services provided (average hours and months that youths participated in each program)
- Funded program-level outcomes (performance measures from their contracts)
- Client success stories (reason for referral, engagement, behavior, outcomes)
- JJCPA/JPAF only:
  - Criminogenic risk (results from OYAS Diversion tool and OYAS Disposition tool, history of alcohol or drug problems, attendance problems, and history of suspension/expulsion)
  - Youth strengths and support needs (results from OYAS Disposition tool)
  - Juvenile Justice Outcomes (youth arrested for a new law violation and youth with probation violations)
- JIRBG/YOYG only:
  - Youth Services Center-Juvenile Hall population reports, booking types, mental health cases, number of bookings and releases per month, average daily population, age of youth
  - Criminogenic risk reassessment (results from OYAS Reentry tool)
- Progress on Recommended LAP Strategies (JJCPA/JPAF only): including a summary of the programs mapped to the LAP strategies and progress by priority area
- Conclusion

ASR plans to develop and deliver two presentations of findings, one for the JJCC and one for funded CBOs. ASR will seek feedback from Probation staff before the reports and presentations are made public.

**4) Evaluation of Existing Resources.** ASR has developed a resource guide for youth and their families based on service needs identified in 2020 Local Action Plan. A brief seven-page summary version alphabetically lists each identified service/program, their contact information, and color-coded display of what types of support each provides. A full 70-page version provides more details about the services offered, languages spoken, ages and other requirements for eligibility, and areas covered. In fall 2025, we will conduct a full update of the guide with alignment to the new 2025 LAP. Thus, starting in 2026 ASR proposes to update the resource guide each year until the new 2030 LAP is completed. Updating the guide entails researching the listed organizations, verifying that their contact information and services are up-to-date, and adding newly identified services. A proposed digital visualization of this resource guide, if

possible, may be optimized for mobile viewing with clear navigation instructions and proposed to include a glossary of terms of key service areas to help orient seekers to service categories. In the fifth year (2030), ASR will fully assess existing services and conduct an extensive search for new resources (including but not limited to programs for: law enforcement and probation, education, mental health, health social services, and drugs and alcohol). The guide will also be reorganized to align with the updated Local Action Plan. Similar to past guides, it can be prepared for distribution in paper form and online for broader access and distribution. If translation is needed by the contractor, ASR will assess capacity in light of available contract funding to support translation of the guide in the primary non-English languages spoken in the county which may allow for a proposed feedback loop to allow seekers to share corrections or requests for more information.

**5) Local Action Plan Development.** Recognizing the growing complexity of youth needs, the 2025 Local Action Plan's reliance on services beyond Probation, and the call for a more collaborative, integrated planning process, starting in 2026 ASR plans to adopt a Results-Based Accountability (RBA) framework and dashboard to align county efforts with broader community-level goals and grounded by the 2025 LAP set of priorities. RBA creates partner buy-in and accountability and is shown to lead to longer-lasting community impact. It allows a diverse group of stakeholders to utilize a data-driven, decision-making process to develop a common language, create a common agenda, and solve problems together. ASR will lead a coalition of county leaders and service partners (e.g., probation, county office of education, behavioral health and recovery services, community colleges, CBOs) in a process to agree on desired impact, performance measures, and roles and responsibilities. These measures will then be used to track how all partners are contributing to making a lasting change. ASR will create an interactive online dashboard with the agreed upon metrics, which will be updated annually for partners to hold each other accountable and see the progress they are making in the county. The dashboard will be user-friendly and visually engaging to help partners make meaning, inform action steps, and meaningfully improve the quality of life for youth and families in San Mateo County. ASR has created similar dashboards for county-wide collaborative efforts including First 5 Solano County, First 5 Santa Clara County, and Child Protective Services in Sacramento County. See more details in the Innovations section.

Starting at the end of the fourth year and culminating in the fifth year, ASR will implement a 2030 Local Action Plan process. As done in 2025, 2020, and 2016, ASR proposes to collect data by facilitating stage-setting listening sessions with the JJCC, Probation Leadership, and funded CBOs, conducting interviews and listening sessions with youth, families, and service providers, and implementing a provider survey. The protocols for the listening sessions and interviews will ask about what is working well to support youth and their families in the county, what are their unmet needs and barriers to accessing resources, and suggestions for improving

services and systems. ASR proposes to review other existing data with an equity lens, such as local reports and research sites that report county data (e.g., kidsdata.org, racecounts.org).

To help fulfill additional requested elements than in past reports, ASR proposes to build upon the RBA framework and dashboard described above to identify what has improved, what needs further work, and what new areas of need or challenge have emerged. This shift to a more collaborative framework and approach than in the past will support cross-system collaboration, roles, responsibilities, buy-in, and accountability in identifying and working toward solutions to better support youth in the county. This framework will create a collaborative and integrated set of action strategies, establish goals and metrics to measure progress, provide a comprehensive assessment of data systems, and create viable and actionable solutions to move beyond systemic, fiscal, and other key challenges.

ASR will analyze and synthesize all collected data and prepare a plan of action for the 2030 LAP based on prioritized needs and county-wide strategies. As per the request of this RFP, the plan will include:

- A. A community-wide, multi-method, multi-phased data collection strategy;
- B. Assessment of local resources serving at-risk youth and juvenile offenders;
- C. Identification of high-risk areas in the community;
- D. A collaborative and integrated juvenile justice action strategy;
- E. Information-sharing strategies and performance measures;
- F. Data systems assessment, including data tracking, accountability and oversight;
- G. Optional elements such as target population and rehabilitation goals; and
- H. Identification of major challenges to implementation and recommendations for addressing them.

ASR will present an overview of the data collection process, findings, and next steps to the JJCC, anticipated in May of 2030, and follow up with an updated dashboard in 2030 to align with the new plan.

**6) Responsive Requests.** ASR proposes to respond to research and evaluation requests from Probation as needed. During the first two years, the “ad hoc” allocation for responsive requests is anticipated to be smaller than subsequent years, as needs are generally more clearly defined at the start. The larger allocation in subsequent years can be allocated to an activity or set of activities that go beyond

technical assistance and may include support for additional data analysis, integrating cross-sector data, a spotlight on a new innovative program or service, logic modeling, a literature review, qualitative data collection to address data gaps, data mapping or visualization, a new survey or tool, or other evaluation services as desired.

### **Adult Services**

The scope of work for **Adult Services** falls into four main categories of work.

**1) Meetings & Collaboration.** ASR proposes to meet with Adult Services Probation staff at the beginning of the contract to initiate our new partnership, establish roles and responsibilities, and become familiar with the key people and programs. Then, by meeting with Probation staff monthly, ASR will be able to monitor changes in needs and services, efficiently plan for evaluation activities, and communicate results effectively. ASR will attend the Community Corrections Partnership (CCP) quarterly and present about our evaluation activities and findings when appropriate.

**2) Update Annual Plan.** Similar to the process ASR has successfully led with the JRBG Annual Plan, ASR proposes to review the CCP Local Implementation Plan, meet with Probation staff to discuss updates to the plan, and create a timeline and strategy for soliciting feedback from key partners. ASR proposes to facilitate two to three discussions with the CCP and provide opportunities for input and edits before finalizing the plan.

**3) Evaluation of Existing Resources.** Building on the process ASR developed for the Youth Resource Guide, we propose to assess existing services for adults and evaluate available resources—including but not limited to programs in law enforcement and probation, education, mental health, healthcare, social services, substance use, and batterer intervention. Based on this assessment, ASR proposes to create a resource guide for adults in year one, which we propose to update in each subsequent year. ASR proposes to make these versions available in paper form and online to be shared with the broader community. If translation is needed by the contractor, ASR will assess capacity in light of available contract funding to support translation of the guide.

**4) Responsive Requests.** ASR proposes to collaborate with Probation staff to determine and scope out additional evaluation needs for Adult Services.

### PROPOSED SCHEDULE \*

Attach proposed schedule reference ability to complete the project within the County's required time frame

ASR\_RFP\_No.\_2025-RFP-00559\_-\_Research\_and\_Evaluation\_Services\_-\_3.5\_Proposed\_Schedule.pdf

#### INNOVATIONS\*

Refence any notable innovations or improvements that you expect to provide (with respect to, for example, efficiency, technology, sustainability)

Drawing on ASR’s experience conducting a large portion of the work described in this RFP, we are planning to implement a few new activities or ways of working together to enhance and adapt our evaluation services.

#### **LAP Results-Based Accountability and Dashboard**

New this year, ASR proposes a process to link priorities identified in the LAP to concrete action steps and metrics. The purpose of RBA is to help align programs to community-level results and to help visualize how programs are helping to “turn the curve” toward the desired results, thus making an impact in the community. This process ties in nicely to the work ASR recently completed with the 2025 LAP in that it will build upon the identified strengths and gaps and identify ways that partners can work together in an interactive, engaging way. ASR proposes facilitating the following process with key stakeholders:

- A. Identify desired impact (What are the quality-of-life conditions we want for the children and families?)
  - o Define population of interest
  - o Community results
  - o Develop indicators
- B. Assess and discuss progress on the most important indicators- how are we (the county) doing on the most important measures?
  - o Identify key partners with a role to play- who/what organization is missing? Are the right people at the table?
  - o Identify and/or develop strategies - what is working well? What is promising?
  - o Identify and define performance measures for key partners - What goals can we set each year and LAP 5-year cycle?
  - o Assess and discuss progress on performance measures- how are we doing as a county?

A key component is defining performance measures for all partners using the concepts of: How much did you do? How well did you do it? Is anybody better off? ASR will facilitate discussions with Probation and partners to agree to the metrics that align with the LAP. These go beyond short-term outcomes and explore quality of life impacts and systems change. These measures will serve as a shared tool for tracking how each partner contributes to achieving lasting change. ASR will design an interactive, user-friendly online dashboard featuring the agreed-upon metrics, updated annually, to foster transparency, mutual accountability, and shared learning. The visually engaging format will make data easy to understand and use, empowering partners to draw meaningful insights, take informed action, and collectively advance the well-being of youth and families in San Mateo County. Below is an example from another project that shows the performance measures (PM), values, and trends.

Department of Human Assistance					
Contributing Partner: DHA		Most Recent Period	Current Actual Value	Current Trend	Baseline % Change
+	PM How much # individuals with new CalFresh applications processed within 30 days	FY2 2025	24,498	↓ 1	-35% ↓
+	PM How much # individuals with new Medi-Cal applications processed within 45 days	FY2 2025	34,920	↑ 1	24% ↑
+	PM How much # of individuals referred to BHS CalWORKs Wellness Team	—	—	—	—
+	PM How well # of referred individuals referred who successfully engage in the BHS CalWORKs Wellness Team	—	—	—	—

### Streamline Data Collection System

ASR proposes to update our approach to managing and protecting sensitive data—one that prioritizes both security and ease of use. ASR will streamline data entry processes for CBOs and Probation by implementing efficient, centralized tools built in SharePoint and/or Smartsheet. These platforms will provide secure, role-based access to ensure that confidential information is fully protected, while also saving time for partners. By standardizing and simplifying data collection systems, ASR will enable more timely reporting, strengthen data quality, and ultimately support better decision-making for programs serving youth and families.

### Recidivism Research Discussion

ASR proposes to engage in discussions with Probation regarding the potential to conduct a focused study on recidivism to explore the constellation of factors that contribute to a youth's successful reentry after, or avoidance of, justice involvement. ASR brings substantial experience in this area, having completed recidivism analyses for San Mateo County Probation (2015), Santa Clara County Probation (2017) and Ventura County Probation (2023). If of interest, exploration of a scope would be expected to take place within the included scope of ad hoc hours. By clarifying the purpose, limitations, and potential value of this research, ASR aims to help Probation make an informed decision about conducting a tailored recidivism study.

While recidivism data can provide valuable insights, it is important to note that such data cannot be used alone to determine program effectiveness. This is due to inherent differences in program design and target populations—some community-based organizations (CBOs), for instance, work primarily with youth who have had more extensive involvement with the juvenile justice system (thus have a higher risk to reoffend), which can be unrelated to the success of an individual program or service that the youth accessed. In addition, youth often access multiple services, so it is difficult to isolate the impact or make causal inferences about the effectiveness of one program or service. A recidivism study is best at identifying factors that are associated with a youth's successful navigation out of the juvenile justice system.

### **Qualitative Data to Enhance Program Evaluation**

Currently, ASR collects data directly from youth and families during the LAP data collection process every five years. Funded programs provide success stories, however to increase understanding of program efficacy, ASR can develop a youth feedback survey and/or conduct focus groups intended to provide direct feedback on specific programs and services that they accessed. This can provide a space for youth to voice their likes and dislikes, and what helped or didn't help them on their journey, and provide additional data to support understanding of each program's effectiveness.

### **PERFORMANCE MEASURES\***

Describe a plan for achieving performance measures

ASR proposes the following performance measures to assess the successful delivery of all activities described in our proposal:

- **Timely Completion:** All tasks and deliverables (100%) are completed in accordance with agreed-upon timelines.
- **Responsiveness:** ASR provides prompt and effective responses to communication and technical assistance requests at all times (100%).

- **Satisfaction with Services:** Probation staff report satisfaction with the quality and value of ASR’s work.
- **Utility of Deliverables:** Probation staff report that the evaluation tools, reports, and related products are relevant, user-friendly, and actionable.

These measures will ensure accountability, promote open communication, and confirm that the evaluation products and processes are meeting the needs of Probation and its partners.

#### FIRM QUALIFICATIONS \*

Attach information regarding background and qualifications, including the following:

- A brief description of the proposer.
- A description of not more than three (3) projects similar in size and scope conducted by the proposer, including the client, reference and telephone numbers, primary staff members involved, budget, schedule, and project summary. Descriptions should be limited to one (1) page for each project.
- If subcontractors are anticipated, identify them (if known) and provide information on how they will be used.

ASR\_RFP\_No.\_2025-RFP-00559\_-\_Research\_and\_Evaluation\_Services\_-\_3.8\_Firm\_Qualifications.pdf

#### TEAM QUALIFICATIONS\*

Provide a chart identifying:

- Project team and reporting structure
- Lead project manager
- Role each person will play in the project

Provide a brief description of the experience and qualifications of the project team members, including short resumes if desired.

Written assurance that the key individuals listed and identified will be performing the work and will not be substituted or reassigned without the County’s prior approval

ASR\_RFP\_No.\_2025-RFP-00559\_-\_Research\_and\_Evaluation\_Services\_-\_3.9\_Team\_Qualifications.pdf

REFERENCES\*

Provide 2 references for each of the following, including the name, position/title, address, email, and telephone number of recent clients (preferably other public agencies):

ASR\_RFP\_No.\_2025-RFP-00559\_-\_Research\_and\_Evaluation\_Services\_-\_3.10.\_References.pdf

FEE PROPOSAL\*

The Fee Proposal should be submitted as a separate PDF file from the Technical Proposals detailed in Required Documents.

The County reserves the right to accept other than the lowest priced offer and to reject any proposals that are not responsive to this request.

ASR\_RFP\_No.\_2025-RFP-00559\_-\_Research\_and\_Evaluation\_Services\_-\_3.11\_Fee\_Proposal.pdf

# EXECUTIVE SUMMARY

## HIGHLIGHTS OF ASR PROPOSAL AND QUALIFICATIONS INCLUDE:

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### Company Background, Experience



- Non-profit with 41 years of community-based evaluation experience located in the Northern California regions of the Bay Area, Santa Cruz, and Sacramento. ASR is comprised of 37 staff, most of whom hold advanced degrees in the social sciences.
  - Conduct projects that include participatory research design, program evaluation, community assessments, surveys, data briefs, technical reports, data visualization and infographics, graphic design, data dashboards, and group facilitation.
- 

### Evaluation and Needs Assessment Expertise in Justice Systems



- 15+ years evaluating JJCPA and JPAF-funded programs and 5+ years evaluation YOBG and JRBG-funded projects, including developing standardized tools and measuring key metrics that work towards the long-term goal of improving outcomes for youth who are justice-involved, vulnerable, and under-resourced.
  - 15+ years developing Local Action Plans for county probation agencies and conducting research and evaluation services for projects serving system-involved youth and adults.
  - Proposed scope of work evaluating youth and adult services includes timely completion of key activities to ensure alignment and sustained progress toward completing program evaluation and annual reports, annual plans, evaluation of existing resources, research and evaluation of ad hoc responsive requests, and a Local Action Plan for juvenile services.
- 

### Principal Advantages



- Local evaluation firm with deep expertise in youth development, mixed methods data collection and analysis, reporting, quality assurance and improvement, technical assistance services, and Results-Based Accountability that measures continuous progress toward desired county-wide outcomes and supports data-driven decisions to support outcomes for individuals served and impacted by the justice system.
  - Demonstrated commitment to embody cultural humility, diversity, equity, inclusion and belonging within the organization and with partners and strong track record of successfully working with counties, public sector entities, and CBOs serving a wide range of children, youth, families, adults and older adults.
  - High caliber public agency references who can speak to ASR's work-ethic, competency, dedication, and ability to impact communities.
-

Furthermore, the ASR team proposed for San Mateo County Probation Research and Evaluation Services are experienced and possess advanced skills working within county systems of care and departments in the evaluation of federal, state, and local grants and programs including designing evaluation plans with performance metrics, providing technical assistance, conducting qualitative data collection and tool development, assessing strengths and opportunities for programs and systems, and facilitating large and small group informational and feedback sessions online or in person.

ASR is committed to delivering exceptional service, by meeting our partners' expectations of communication, accuracy and timeline. We will ensure that all telephone and email inquiries will be addressed within 8 business hours, reflecting our dedication to responsive and proactive client engagement. ASR will also carefully follow agreed-upon timelines, and our produced work will be thorough and accurate, underscoring our commitment to quality and precision.



August 8, 2025

San Mateo County Probation Department  
222 Paul Scannell Drive  
Floor 2/Floor 1  
San Mateo, CA 94402

Re: Research and Evaluation Services Request for Proposals (RFP No. 2025-RFP-00559)

To Whom It May Concern:

On behalf of Applied Survey Research (ASR), I am pleased to present this proposal to the San Mateo County Probation Department to be considered for research and evaluation services. Our decades of conducting research toward our mission of helping people build better communities and our skilled team makes ASR uniquely suited to carry out the activities described for the period of 2026 to 2030. Below is my contact information as the person responsible for communication regarding this RFP, and I am authorized to obligate the firm to perform the commitment contained in the proposal.

Contact Person	Kim Carpenter, Ph.D. Vice President of Research and Evaluation
Office Phone	831-728-1356
Email	<a href="mailto:kim@appliedsurveyresearch.org">kim@appliedsurveyresearch.org</a>
ASR Bay Area Address	Applied Survey Research P.O. Box 1927 Watsonville, CA 95077

ASR has the requisite knowledge, skills, and experience to provide a range of evaluation services, as demonstrated in our Executive Summary below and the proposal that follows. We are excited for the opportunity to continue our work with San Mateo County Probation Department over the next five-year cycle and to continue supporting your commitment to promoting community safety and individual rehabilitation across juvenile and adult populations. Leveraging our specialized evaluation expertise and the proposed activities detailed in the proposal, ASR is committed to rigorously assessing program effectiveness, strengthening accountability, and driving measurable improvements that advance positive outcomes for individuals who are justice-involved and their communities.

Sincerely,

*Kim Carpenter*

Kim Carpenter, Ph.D.





## 3.8. Firm Qualifications

### DESCRIPTION OF THE PROPOSER

#### Organizational History and Background

ASR is a non-profit social research firm dedicated to conducting, analyzing, disseminating, and using community-based research to help people build stronger communities. For more than 40 years, ASR's mission has been to help communities improve quality of life, strengthen the systems and organizations that serve the most vulnerable in the community, and work towards effective solutions to address individual, organizational, and community needs. With staff centered in the Northern California areas of Sacramento, Santa Cruz, and the greater Bay Area, ASR specializes in evaluation services including local needs assessments, community and health assessments, strategic planning, program development and evaluation, data visualization and dissemination, and recommendations for program improvement or strategic re-alignment for government agencies, foundations, nonprofits, and coalitions.

ASR specializes in the issues affecting vulnerable populations of children, youth, and adults in areas such as education, health care, mental health, housing, wellbeing, and racial equity. Additionally, projects related to community safety, the criminal legal system, and reentry are areas of expertise for ASR, along with extensive experience working with community-based organizations to develop evaluation and data collection plans, monitor data quality, and produce comprehensive public-facing reports. ASR also routinely conducts community assessments similar to San Mateo Probation's Local Action Plan to determine the needs of vulnerable populations. For example, in Solano County, ASR was hired by the Board of Supervisors to carry out the Human Services Needs Assessment and use the findings to create an outcomes framework to guide the Board's discretionary spending.

ASR has assisted many County organizations, their grantees, and other organizations to develop or refine their strategic frameworks, logic models, measures, and reporting systems by employing methods such as: 1) Gathering primary and secondary quantitative data, including compiling Results-Based Accountability (RBA) and data dashboards to facilitate understanding of needs, processes, efforts, and outcomes; 2) Conducting qualitative research, such as focus groups in multiple languages, and key informant interviews with individuals across communities or sectors; 3) Facilitating prioritization of needs with collaborative members; and 4) Researching evidenced-based practices for future implementation strategy consideration. Results of these efforts are typically presented to commissions, the public, and other stakeholder groups in engaging ways and in formats customized for our partners' audiences. In addition, although program evaluation typically falls outside the purview of the Institutional Review Board (IRB), participants in all research and evaluation activities need standard protections and assurances, particularly those who are considered members of vulnerable populations. Thus, ASR will obtain IRB approval when required and will always follow the principles that define the IRB research code of ethics in our work.

In summary, ASR is well-qualified and highly experienced in performing similar activities to those sought in this RFP, described in further detail below.

### **Experience With Youth Development and Juvenile Justice Programs**

ASR has conducted youth-focused research for over 20 years, including evaluating and supporting of Kids in Common's Opportunity Youth Partnership, a collaborative aimed at changing the trajectories of youth who have been or are at-risk of becoming disconnected from school and from work; providing ongoing evaluation services for Santa Cruz Juvenile Probation Department's programs focused on violence prevention, family support, restorative justice, diversion, and access to resources for justice-involved youth; completed a landscape study for youth in Marin County; partnering with the Office of Youth and Community Restoration (OYCR) to evaluate the DJJ realignment implementation process (see Project Example 1); and building a JJCPA evaluation framework and defining grantee data submission protocols and performance measures as a part of our program evaluation activities for the Riverside County Probation Department. All the above projects are in progress or were completed within the last 12 months.

In addition, ASR has a nearly two-decade-long history of evaluating programs funded by the Juvenile Justice Crime Prevention Act (JJCPA) in San Mateo, Santa Clara, Ventura, and Riverside counties, including leading annual evaluation efforts for JJCPA, JPAF, YOYG and JIRBG funding streams and conducting three Local Action Plan (LAP) processes with San Mateo County Probation since 2008. In this work, ASR developed methods to ensure funded programs accurately track the demographics of their clients, the frequency and nature of the services that clients receive, and outcomes of those services. We have honed our ability to design and implement county-wide evaluations that use practical yet precise methods for summarizing the contributions of multiple partners toward similar outcomes while accounting for the unique contextual factors that each partner brings to the table.

### **Expertise in Statistics and Database Management with Partners**

ASR seeks ways to use our statistical and data expertise to deliver accurate and reliable annual data as well as to draw upon existing data to answer new questions. For instance, in the past ASR used administrative data from schools and probation to evaluate specific educational outcomes of program participants and matched comparison peers related to attendance, disciplinary incidences, and academic performance. ASR helped to answer questions related to the rates and contributing factors for youth who successfully avoid further involvement in the justice system after their initial encounter by conducting recidivism studies for San Mateo, Santa Clara, and Ventura Counties, utilizing factor analysis and regression modeling statistical techniques. In summary, ASR's statistical expertise enables us to carry out the necessary analytical steps to get answers to tough questions about the populations served and the impacts of services across complex systems.

## A Familiar, Highly Competent, and Proven Team

Good relationships take time to build, and ASR's years of experience working with the Juvenile Probation team in San Mateo and its network of community-based organizations (CBOs) has created relationship equity that we value highly and work to sustain. CBO staff are on a first-name basis with ASR staff to address all questions related to data forms, processing, entry and analysis. Senior leadership and the JJCC are in good hands with Kim Carpenter and Kim Gillette as the "vision-holders" ensuring the precision and responsiveness of the current evaluation of San Mateo County's JJCPA, JPAF, YOBG, and JJRBG-funded programs and services and the implementation of the 2025 Local Action Plan. The strength of our team is a part of ASR's 'special sauce' that supports high client satisfaction with our services.

## PROJECT EXAMPLES

### Project Example #1

**Project Title, Partner, and Contact:** 2025 DJJ Realignment Report; Office of Youth and Community Restoration (OYCR); Christian Lucchesi, Research Data Specialist II, OYCR, (916) 639-8051

**Primary Staff Assigned:** Susan Brutschy, Christa Bixby, Maria Usacheva, Alyssa Mullins

**Budget, Timeline, and Activities:** \$178,775; June 2024 to July 2025. Phases of this project included: planning, collecting and synthesizing secondary sources; analyzing historical juvenile justice data including arrests, referrals, adjudications, and transfers to adult court; obtaining IRB approval; designing and conducting interviews, focus groups, and surveys; developing protocols for best practices in conducting focus groups with youth and probation; conducting feedback sessions for youth and probation to review the accuracy of the synthesized data and to capture their voices and perspectives; and preparing and presenting the 2025 multi-year report.

**Project Summary:** The 2025 DJJ Realignment Report, prepared by ASR in accordance with Welf. & Inst. Code § 2200(e), offers an overview of California's youth justice realignment following the closure of the Division of Juvenile Justice (DJJ) under Senate Bill 823 (2020). The report covers implementation progress from 2020 through 2024, summarizing how California's 58 counties have assumed responsibility for youth found responsible for serious offenses, including shifts toward more restorative and health-based models of care.

In the preparation of the report, ASR conducted interviews, focus groups, and surveys to gather data across key stakeholders of the youth justice system, including youth, probation staff, judges, defenders, district attorneys, board of supervisors, and behavioral health providers. ASR used an intentional, participatory approach in collecting feedback, reflecting the synthesized feedback to participants, and ensuring accuracy in the framing of the voices included. The report reflects a critical inflection point: while counties continue to lay the foundation for a more coordinated and community-anchored youth justice system, the report calls for sustained investment, statewide learning, and policy oversight to fulfill the intent of

SB 823 - to promote youth accountability and healing through equitable access to care, safe and therapeutic environments, and long-term support for successful reentry.

The report provides recommendations to the Governor's office on ways to continue to build upon the work already initiated through targeted policy and task forces. Other intended purposes of the report include: a reference guide to understand the continuum for youth in Secure Youth Treatment Facilities, a way for counties across the state to gather ideas from their colleagues, and an educational tool for community members to understand the depth and complexity of the juvenile justice system in California and the intention to shift it to a health-based approach. Sharing of findings is planned in collaboration with ASR and OYCR via a webinar through the OYCR Youth Justice Action Series, a presentation to the Child Welfare Committee, and a presentation at the Beyond the Bench conference.

### **Project Example #2**

**Project Title, Partner, and Contact:** Juvenile Justice Programs – Evaluation & Planning; Riverside County Probation; Olivia Serna, Division Director, Riverside County Probation Department, (951) 359-4321.

**Primary Staff Assigned:** Kim Carpenter, Kimberly Corneille, Kim Gillette, Sofia Stepanyan, Sandra Arellano

**Budget, Timeline, and Activities:** \$555,000 (January 2025 to June 2027). ASR's contract includes 5 major evaluation areas which are: comprehensive annual program evaluations of JJCPA-funded programs, a comprehensive measurement report, a sustainability plan, a special report on the Youth Accountability Team (YAT) program, and a Juvenile Justice Plan (similar to San Mateo's Local Action Plan).

**Project Summary:** ASR is currently conducting a large-scale evaluation of Riverside County programs funded through the Juvenile Justice Crime Prevention Act (JJCPA) to assess effectiveness, guide improvements, and update the County's Juvenile Justice Plan for the next three years. This work supports Riverside County in delivering effective, collaborative services that prevent and respond to juvenile crime and provide the best possible programs for youth and families.

Under program evaluation specified in our contract, ASR assesses all JJCPA-funded programs regarding service delivery, performance outcomes, use of evidence-based practices, and areas for growth. Activities include collecting feedback from youth, families, and staff of JJCPA funded programs and services; developing grantee data trackers and data collection systems; and producing an annual evaluation report with data visualizations and a two-page summary, presented annually to the JJCC. ASR is also engaged in two additional areas of work to develop an overarching evaluation framework that articulates and tracks progress on the desired outcomes of funded programs and services. A Comprehensive Evaluation Report will identify consistent data points, track outcomes, analyze program performance, compare outcomes to similar California counties, and conduct cost-benefit analyses. ASR's Evaluation Sustainability Plan defines uniform outcome measures, standardized monthly reporting, and a

self-evaluation system including program evaluation tools and a formalized evaluation structure to follow. Last, ASR is completing a special report on program participation and outcomes of youth in the Youth Accountability Team (YAT) diversion program, including an analysis of program data by race/ethnicity, gender, age at the time of alleged offense.

Also in development is Riverside's Juvenile Justice Plan for 2025. ASR is currently gathering community input to understand the needs, service gaps, and opportunities to improve outcomes for the youth in the county. ASR is engaged in data collection (key informant interviews, focus groups, and electronic survey) and analyzing and synthesizing findings that map current needs, define priority areas, and identify promising and evidence-based practices within those priority areas. In the plan, ASR includes evidence-based programs and other potential action steps to better align funding with county priorities.

### **Project Example #3**

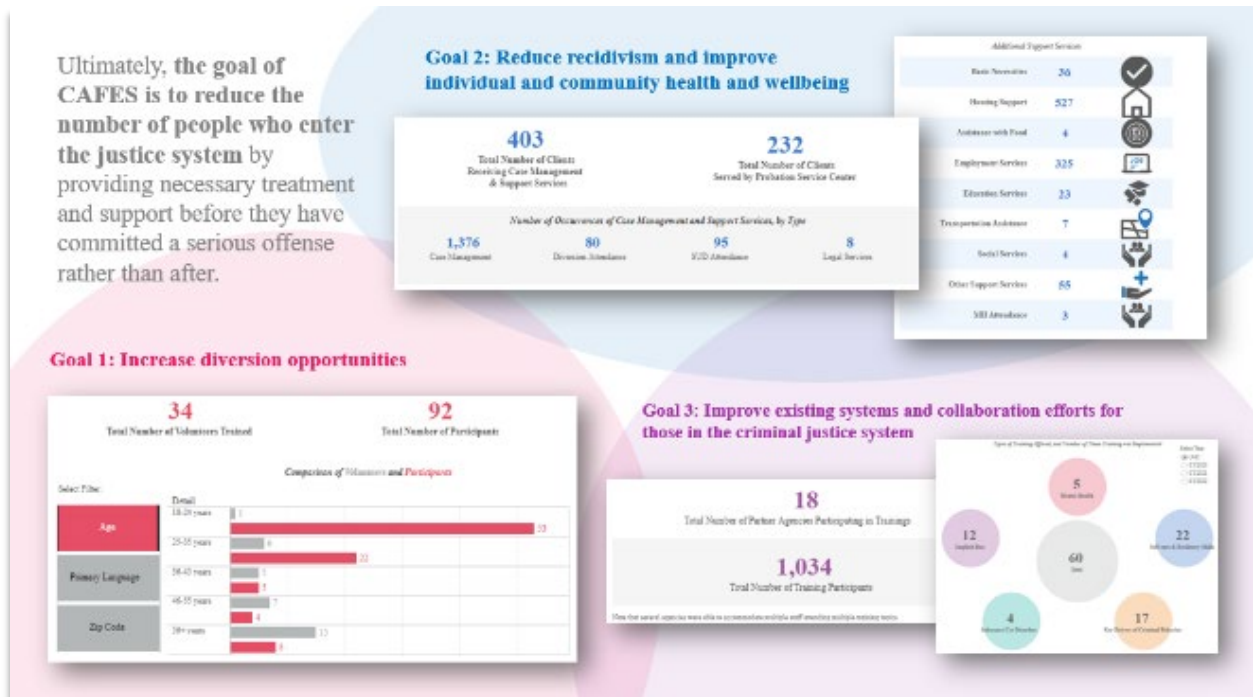
**Project Title, Partner, and Contact:** Evaluation of Santa Cruz County's CAFES/Prop 47 Grants; Santa Cruz County Probation Department (CAFES); Sarah Fletcher, Division Director, Adult Services, County of Santa Cruz, (831) 454-3204.

**Primary Staff Assigned:** Jennifer Anderson-Ochoa, Juliana Huaroc, Julie Burr

**Budget, Timeline and Activities:** Cohort II: \$588,000 (Oct 2019- May 2023)/ Cohort III: \$500,000 (October 2022-June 2026)

**Project Summary:** Starting in 2020, ASR has been the evaluation partner for Santa Cruz County Probation Department to evaluate their Coordinated Access for Empowering Success (CAFES) Program for Cohorts II and III. The CAFES project is a trauma-informed, evidence-based, multi-agency continuum of care model that expands and enhances services for underserved populations, focusing on people committing first-time offenses and those who had been ruled out of specialty mental health treatment services. ASR developed a local evaluation plan and various data collection tools, engaged in ongoing data collection and monitoring, and produced annual and final evaluation reports that were provided to the Board of State and Community Corrections (BSCC). Aggregate data tracking tools and partner data tracking tools were developed to track process and outcome measures aligned with BSCC requirements for various reporting quarters across the evaluation years. Data dashboards were created to report on program findings on key implementation and outcomes measures.

A brief summary of the CAFES goals are depicted below.



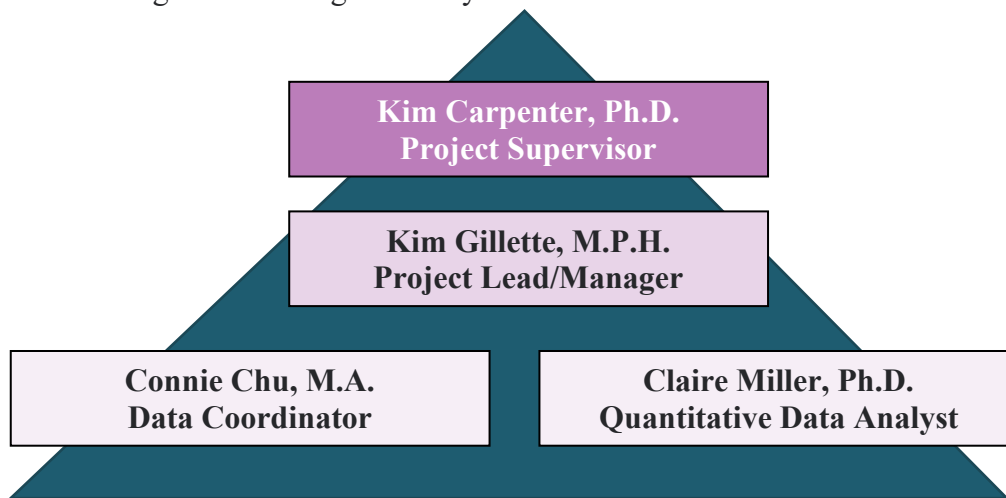
## SUBCONTRACTORS

ASR understands the importance of working with a consistent, reliable team. Due to our extensive team of well-qualified staff, ASR typically completes projects utilizing in-house staff rather than relying on subcontractors. If needed, however, ASR has developed a cadre of subcontractors whom we connect with for support with translation services (International Contact), telephone surveys (IHR), graphic design (Single Chair Studios), Tableau (Capitol Data Analytics LLC), and IT (Gilbert Calvillo, private consultant). ASR also partners with independent contractors or firms as needed to provide in-person or online feedback sessions for individuals or groups that ASR does not currently have internal capacity to support, such as languages other than English, Spanish, and limited Mandarin. At this time, we do not anticipate engaging any subcontractors to perform the work described in this proposal. If awarded the contract, we will inform Probation staff of our engagement with any subcontractor.

### 3.9. Team Qualifications

#### PROJECT TEAM AND REPORTING STRUCTURE

The proposed ASR team includes four staff members currently working with the San Mateo Probation Juvenile Division. The reporting structure depicted in the figure below shows Kim Carpenter serving as a high-level supervisor, Kim Gillette serving as the day-to-day lead, project manager, and primary contact. She will provide leadership and direction to the support team that includes Connie Chu as the data coordinator, managing data collection and technical assistance with grantees and with Probation, and Claire Miller as the primary data analyst conducting data cleaning and analysis.



The roles, responsibilities, and key attributes of each team member are further described below, followed by a full staffing list and CVs for each team member.

**Kim Carpenter, Ph.D., Vice President of Research and Evaluation at ASR.** She will serve as the **Project Supervisor**. She has been a member of the ASR team on projects with San Mateo County Probation Department for 15 years, including leading the most recent LAP. Dr. Kim C. began at ASR in 2011 and has coordinated process and outcome evaluations, needs assessments, and strategic planning efforts in the areas of child development, child mental health, at-risk youth, family engagement, and parenting skills programs. Recent projects completed include: Two 5-year SAMHSA grant-funded projects with Santa Clara County Superior Court Dependency Courts to evaluate programs aiming to 1) increase child reunification rates for parents with a recent history of substance use disorder, and separately 2) support court-involved clients with cooccurring mental health diagnoses and housing instability to receive case management support and connection to supportive housing. She also supervised the Ventura County and San Mateo County Probation Department’s Youth Local Action Plans (LAP) and comprehensive annual grant evaluation reports, and evaluations of two San Mateo Human Services Agency programs that support education and career development for foster youth and mental health support for highly vulnerable young children. She holds Ph.D. and M.S. degrees in Developmental

Psychology from Vanderbilt University, and a B.A. degree in Psychology from the University of California, Santa Barbara.

**Kim Gillette, M.P.H., Senior Project Manager at ASR.** Kim G. will continue to serve as the **Project Lead/Manager**. For the last four years she has led San Mateo County Probation Comprehensive Annual Evaluation Reports project. She has over 20 years' experience managing nonprofit and government programs, including developing and evaluating programs, fundraising, and building collaborations to improve communities. At ASR, she manages the Community Health Needs Assessments (CHNAs) for Kaiser Permanente, Sutter Health, and NorthBay Health hospital systems across Alameda, Contra Costa, and Solano counties, which includes coordinating teams responsible for data collection, analysis and reporting and communicating timelines and results to partners, as well as developing evaluation plans, surveys, and focus group interview protocols. Other projects of note are the Riverside County Probation Department Evaluation, First 5 Solano Systems Change Report, First 5 Solano report on Foundation Giving on Solano County and the Bay Area, and Solano Land Trust Equitable Access to Quality Outdoors Spaces. Prior to working at ASR, Kim G. was the Director at Daly City Youth Health Center and managed 25 team members and the operations of a comprehensive health center for low-income youth, providing them with primary health care, behavioral health services, health education, and vocational programs. In that role, Kim G. co-chaired the San Mateo Behavioral Health Co-occurring Steering Committee and participated in the Contractors' Association, in which she gained extensive knowledge of the services offered by the county and the CBO contractors. Kim G. holds an M.P.H. in Health Behavior & Health Education from the University of Michigan, Ann Arbor, and a B.A. in Psychology from University of California, Berkeley.

**Connie Chu, M.A., Research Analyst II at ASR.** Connie will continue her role as the **Data Coordinator**. As Connie has partnered with San Mateo County Probation for over seven years, she has deep knowledge of the data collection process and well-established relationships with key contacts at Probation and the CBOs. Connie joined ASR in 2016 and currently supports assessments and evaluations in the areas of kindergarten readiness and juvenile probation. Connie has previously supported policy implementation and technical assistance in the areas of basic education, inclusive education, and gender mainstreaming with field experience in international contexts. Connie holds a master's degree in organizational leadership, policy, and development from the University of Minnesota Twin Cities and bachelor's degrees in history and religious studies from the University of California, Riverside.

**Claire Miller, Ph.D., Senior Research Analyst II at ASR.** Claire will continue to serve as the **Quantitative Data Analyst** with San Mateo Probation by augmenting the core team to address specific needs in the evaluation process, such as preparation and analyses of data from Probation and CBOs. With three years of experience working with San Mateo County Probation Department data, she is familiar with both the datasets provided and the analyses they require. Claire has 15 years of research experience within the areas of social sciences, experimental research design, advanced quantitative research methodology, and learning

analytics. In addition, she has extensive experience working with large data sets, designing data visualization dashboards in Tableau, and writing reports for publication.

Claire has expertise in basic inferential statistics, including parametric and nonparametric analytic methods, as well as advanced quantitative methodologies, such as structural equation models (path analysis, factor analysis, multivariate analysis, latent growth curve models) and generalized linear mixed models (hierarchical models). Her work has been presented at multiple national conferences, including the American Educational Research Association and American Psychological Association, and has been published in peer-reviewed journals. Claire has over 10 years of experience teaching undergraduate and graduate level courses, including educational psychology, classroom assessment, research methods, and advanced statistical methods (e.g., multiple regression).



**Leadership Team**

**Susan Brutschy**  
*President*

**Peter Connery**  
*Vice President/ CFO*

**James Connery**  
*Vice President of  
Research and  
Operations*

**Kim Carpenter**  
*Vice President of  
Research and Evaluation*

**Lisa Colvig-Niclai**  
*Senior Vice President of  
Planning and Evaluation*

**Staff by Office Affiliation**

**Central Coast (5)**

**John Connery**  
*Senior Project  
Manager*

**Jennifer  
Anderson-Ochoa**  
*Senior Project  
Director*

**Julie Burr**  
*Project Manager*

**Juliana Huaroc**  
*Project Manager*

**Alex Werner**  
*Research Analyst*

**Bay Area (6)**

**Kim Corneille**  
*Project Manager*

**Claire Miller**  
*Senior Data  
Analyst*

**Connie Chu**  
*Research  
Analyst II*

**Kim Gillette**  
*Senior Project  
Manager*

**Sofia  
Stepanyan**  
*Senior  
Research  
Analyst*

**Sandra  
Arellano**  
*Research  
Analyst II*

**Sacramento (12)**

**Jordan Katti**  
*Project Director*

**Alyssa Mullins**  
*Senior Project  
Manager*

**Jessica Irwin**  
*Project Manager*

**Angie Flamenco**  
*Senior Planning  
Analyst*

**Christa Bixby**  
*Senior Planning  
Analyst*

**Elizabeth  
Mower**  
*Project Director*

**Jim Wright**  
*Project Manager*

**Daphna Ram**  
*Senior Research  
Analyst*

**Janice Kim**  
*Senior Planning  
Analyst*

**Javari  
Fairclough**  
*Senior Data  
Analyst*

**Rebecca  
Handman**  
*Senior  
Research  
Analyst*

**Chelsie  
Hess**  
*Senior  
Research  
Analyst*

**Cross-office**

**Gil  
Calvillo**  
*IT*

**Jamie  
Norton**  
*Graphic  
Design*

**Aly Gomez-  
Chandler**  
*Bookkeeper*

**Laura  
Connery**  
*Director of  
Operations  
and Impact*

**Laura  
Johnsen**  
*Operations  
Coordinator*

**Keri  
Correa**  
*Copy  
Editor*

**LaTina  
Price**  
*Associate*

**Ryan Mays**  
*Persimmony  
Associate*

**Mike  
Shenouda**  
*Apricot 360  
Associate*

## KIM CARPENTER, PH.D.

Vice President of Research and Evaluation

### KEY SKILLS

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Child development expert with over 20 years of quantitative research experience, including coordinating multi-phase research projects with young children. Expertise in all aspects of research implementation including: Project planning/design, literature reviews, grant writing, participant recruitment, staff training, IRB compliance, assessment tool selection, data collection, database management, statistical analysis, report writing, and community engagement.

Objectives include: utilizing the best scientific techniques and multimodal designs to produce actionable, evidence-based feedback to organizations working to improve the health, education, and well-being of children of all ages and their families.

### EDUCATION

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2004 **Ph.D., Developmental Psychology**, Department of Psychology & Human Development, Vanderbilt University, Nashville, TN.

1997 **M.S., Developmental Psychology, Mental Retardation (minor)**, Department of Psychology & Human Development, Vanderbilt University, Nashville, TN.

1994 **B.A., Psychology**, University of California at Santa Barbara, Santa Barbara, CA.

### PROFESSIONAL EXPERIENCE

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**Vice  
President of  
Research and  
Evaluation**

**San Jose, CA, 2024 – present**

- Cultivate new business opportunities and partnerships.
- Provide advanced design, implementation, and capacity building services, including evaluation frameworks, tools, and assessments.
- Supervise, advise, and train ASR evaluation teams.
- Performed all duties of previous position at ASR.

**Project  
Director,  
Applied  
Survey  
Research**

**San Jose, CA, 2020 – 2024**

- Supplied the strategic vision and design for ASR's evaluation partners.
- Drove organizational culture and development.
- Performed all duties of previous position at ASR.

**Project  
Manager II,  
Bay Area  
General  
Manager,  
Applied  
Survey  
Research**

**San Jose, CA, 2015 – 2020**

- Oversaw projects and managed staff at ASR's San Jose location.
- Supported organizational growth and development
- Performed all duties of previous position at ASR.

**Project  
Manager,  
Applied  
Survey  
Research**

**San Jose, CA, 2012 – 2015**

- Led the development of research projects including writing proposals, meeting with new clients, and helping determine evaluation needs.
- Designed data collection plans involving survey design, focus groups, interviews, and/or analysis of existing data.
- Conducted scientific literature reviews of best-practices and tools for early childhood development and intervention services.
- Led project data collection activities, including cleaning and verification, finalized data analysis requests according to original evaluation design/questions, coordinated processing of data, analyze preliminary data, and synthesized multiple kinds of data to produce summaries/ key findings.
- Disseminated findings through engaging reports and presentations.

**Senior  
Research  
Analyst,  
Applied  
Survey  
Research**

**San Jose, CA, 2010 – 2012**

- Helped refine scopes of work, finalized evaluation questions and designs.
- Drafted survey instruments or other protocol according to evaluation design and variables of interest.
- Coordinated collection of data, including cleaning and verification, helped finalize data analysis requests according to original evaluation design/questions, coordinated processing of data, helped analyze preliminary data, and synthesized multiple kinds of data to produce summaries/ key findings.

**Adjunct  
Faculty,  
Departments  
of Psychology**

**Santa Clara University, Santa Clara, CA 2009-2010**

**Rutgers, the State University of New Jersey, New Brunswick,  
NJ 2007 – 2009**

**Seton Hall University, South Orange, NJ 2006 — 2007**

- Independently designed and taught undergraduate courses in Child Development, Developmental Psychology, Introduction to Psychology and Personality.

**Instructor &  
Lab  
Coordinator,  
Department of  
Psychology,  
Princeton  
University**

**Princeton, NJ, 2007 – 2009**

- Designed the course curriculum for the Introduction to Psychology Lab, prepared instructive tools, and created evaluation materials.
- Conducted weekly training seminars for 6-8 graduate student lab instructors.
- Troubleshot issues with instructors, students, and lab equipment.
- Collaborated with Princeton faculty on course instruction and management.

**Postdoctoral  
Research  
Fellow,**

Institute for  
the Study of  
Child  
Development,  
Dept. of  
Pediatrics,  
UMDNJ,  
Robert Wood  
Johnson  
Medical  
School

**New Brunswick, NJ, 2003 – 2006**

- Conducted research studies investigating infant learning and emotion as well as secondary data analysis investigating relations between early maternal depression, attachment status and children's internalizing and externalizing problems in first grade.
- Performed statistical analyses and consulting using SPSS and SAS on research projects including: Emotion knowledge in maltreated children, developmental sequelae of prenatal cocaine exposure, and others.
- Maintained IRB approval and prepared conference presentations, articles for journal publication, and grant proposals.

**ACADEMIC HONORS, AWARDS, PUBLICATIONS AND CONFERENCE  
PRESENTATIONS**

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Awarded a three-year NICHD Behavioral Research Traineeship in Mental Retardation, 1994

Publications and conference presentations are available upon request.

## KIM GILLETTE, M.P.H.

Senior Project Manager

### KEY SKILLS

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Kim has over 20 years of experience managing nonprofit and government programs, including developing and evaluating programs, fundraising, and building collaborations to improve communities. In her last role, as a consultant at BuildingBlox Consulting, she provided training to nonprofit executives and board members to effectively lead their organizations, coached leaders and provided them with tools and expertise to solve challenges, and conducted needs and feasibility assessments to help nonprofit organizations strategically plan for the future. Prior to that, Kim was the Director of the Daly City Youth Health Center for ten years. In this role she managed the team members and operations of a comprehensive health center for low-income youth, providing them with primary health care, behavioral health services, health education and vocation programs. She successfully led the planning and fundraising to enable the Health Center to move into a new, state-of-the-art, teen-friendly facility.

### EDUCATION

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2003 **M.P.H., Health Behavior & Health Education, Reproductive and Women's Health,**  
University of Michigan, Ann Arbor, MI

2000 **B.A., Psychology,** University of California Berkeley, Berkeley, CA

### PROFESSIONAL EXPERIENCE

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**Senior  
Project  
Manager,**  
Applied  
Survey  
Research

**San Jose, CA, 01/2025 – present**

- Manage multiple projects, conduct strategic planning efforts and needs assessments to help partners understand their key populations and improve services provided.
- Highlighted projects: Kaiser Permanente, Sutter Health, and NorthBay Health Community Health Needs Assessments, San Mateo County Probation Annual Evaluation, Riverside County Probation Evaluations.

**Project  
Manager,**  
Applied  
Survey  
Research

**San Jose, CA, 07/2022 – 12/2024**

- Coordinated teams responsible for data collection, analysis and reporting and communicate timelines and results to partners.
- Developed evaluation plans, surveys, and focus group interview protocols.
- Highlighted projects: First 5 Solano Systems Change Report, First 5 Solano report on Foundation Giving on Solano County and the Bay Area, and Solano Land Trust Equitable Access to Quality Outdoors Spaces.

**Senior  
Research  
Analyst II,  
Applied  
Survey  
Research**

**San Jose, CA, 06/2021 – 07/2022**

- Responsible for implementing evaluations, data analysis, project management, interaction with partners, report writing, and overseeing multiple projects at once.
- Provided insight to partners on data collection and interpretation to improve program models and practices.
- Highlighted projects: Kaiser Permanente Community Health Needs Assessment, San Mateo County Probation Annual Evaluation.

**Consultant,  
BuildingBlox  
Consulting**

**San Francisco, CA 02/2019 – 06/2021**

- Advanced non-profit and government organizations through fundraising assessments, strategic planning, and facilitating board retreats.
- Coached leaders and provided them with tools and expertise to solve challenges.
- Managed projects to ensure deliverables are on track to meet the clients' needs in a timely manner.
- Trained nonprofit executives and board members to successfully launch fundraising campaigns and more effectively lead their organizations.
- Assisted foundation with determining feasibility of a potential major fundraising campaign by working with individual and corporate donors and likeminded foundations to study their interest level in the campaign initiatives and their likely financial support for the campaign.

**Director,  
Daly City  
Youth Health  
Center**

**Daly City, CA 07/2008 – 08/2018**

- Managed 25 team members and operations of comprehensive health center for low-income youth, providing them with primary health care, behavioral health services, health education, and vocational programs.
- Successfully developed and implemented programs while fundraised and managed annual budget of \$1 million from foundation grants, individual donors, and foundations, including writing proposals, contracts, grant reporting and invoicing.
- Moved health center into a state-of-the-art new facility from developing the concept, funding, design, planning, construction, and opening of a new Federally Qualified Health Center.
- Built strong relationships with community partners, major donors, clients, and stakeholders, which increased brand recognition and donations - totaling over \$4.2 million in two years.
- Chaired advisory council of health center and liaised with school board members.

- Led community collaborations and councils, including facilitating coalitions' strategic planning processes and co-chairing multiple committees.
- Evaluated programs to ensure alignment with health center's mission, funder's requirements, and community needs. Created and implemented new evaluation tools demonstrating clients' mental health improved 80% with health center counseling services.
- Steered strategic planning process with staff, youth, volunteers, advisory council, elected officials, and community members. Created practical plan and implemented strategic vision of a new holistic health center.
- Oversaw internal and external communications via social media, website design and content, newsletters and mass emails.

**Program  
Manager,  
Community  
Clinic  
consortium**

**Richmond, CA, 08/2006 – 06/2008**

- Coordinated research of the specialty care needs of uninsured patients in Solano County.
- Facilitated programs to improve service delivery for low-income populations, including preparing clinic staff for emergencies.
- Prepared grant proposals and reports to foundations for funding for Community Clinic Consortium and community clinic members.

Conference presentations are available upon request.

## CONNIE CHU, M.A.

Research Analyst II

### KEY SKILLS

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Experienced research analyst specializing in data collection management, technical assistance, and quantitative and qualitative analyses. Skilled in quality control and project coordination for strategic planning initiatives, program evaluations, and assessments of community needs and assets. Current work centers on supporting youth who are justice-involved, under resourced, and underserved and in the early education sector.

### EDUCATION

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2024 **M.A., Organizational Leadership, Policy, and Development**, University of Minnesota  
Twin Cities, Minneapolis, MN

2008 **B.A., History; Religious Studies**, University of California Riverside, Riverside, CA

### PROFESSIONAL EXPERIENCE

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**Research Analyst II,**  
Applied Survey Research

**San Jose, CA, 6/2020 — Present**

- Lead coordination and support implementation of multiple research projects, including data collection oversight, analysis, report development and reporting activities, technical assistance and quality control. Collaborate with partners to identify data needs, source secondary data, and respond to research requests.

**Research Analyst,**  
Applied Survey Research

**San Jose, CA, 11/2018 — 2/2020**

- Supported ongoing projects through data collection, participant recruitment, secondary data support, and project coordination. Conducted data analysis and contributed to report writing and review.

**Research and Administrative Assistant,**  
Applied Survey Research

**San Jose, CA, 9/2016 — 11/2018**

- Monitored data collection and supported qualitative research activities. Proofed data, created visualizations, conducted literature reviews, and contributed to report writing and general administrative support.

**Marketing Research Assistant,**  
MDSUN

**Arcadia, CA, 3/2015 — 3/2016**

- Conducted market research and supported event coordination. Developed bilingual marketing materials and collaborated with legal counsel on compliance matters.

**Project Assistant,**

**Bangkok, Thailand, 7/2014 — 12/2014**

SEAMEO

- Provided technical and logistical support for the 2014 SEAMEO Congress. Managed abstract submissions and reviews, served as liaison for over 500 stakeholders, and authored the event evaluation report.

**Graduate  
Intern,  
UNESCO  
Bangkok**

**Bangkok, Thailand, 5/2013 — 9/2013**

- Assisted in the preparation of country case studies and conducted desk reviews and research requests for senior education specialists. Supported coordination of regional convenings for partners and collaborators across education sector.

Publications and conference presentations are available upon request.

# CLAIRE (COGLIANO) MILLER, PH.D.

Senior Research Analyst II

## KEY SKILLS

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Dr. Miller has 17 years of research experience within the areas of social sciences, experimental research design, advanced quantitative research methodology, and learning analytics. In addition, she has extensive experience working with large data sets, designing data visualization dashboards in Tableau, and writing reports for publication. Dr. Miller has expertise in basic inferential statistics, including parametric and nonparametric analytic methods, as well as advanced quantitative methodologies, such as structural equation models (path analysis, factor analysis, multivariate analysis, latent growth curve models) and generalized linear mixed models (hierarchical models). Her work has been presented at multiple national conferences, including the American Educational Research Association and American Psychological Association, and has been published in peer-reviewed journals. Dr. Miller has over 10 years of experience teaching undergraduate and graduate level courses, including educational psychology, classroom assessment, research methods, and advanced statistical methods (e.g., multiple regression).

## EDUCATION

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2018 **Ph.D., Educational Psychology**, University of Nevada Las Vegas, Las Vegas, Nevada

2013 **M.S., Educational Psychology**, University of Nevada Las Vegas, Las Vegas, Nevada

2010 **B.A., Psychology**, Nevada State College, Henderson, Nevada

## PROFESSIONAL EXPERIENCE

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**Senior  
Research  
Analyst II,  
Applied  
Survey  
Research**

**San Jose, CA, April 2022 – Present**

- Collect, process, and analyze community- and program-level data.
- Produce professional reports and briefs.
- Design innovative data visualization dashboards in Tableau.

**Visiting  
Assistant  
Professor,  
University of  
Nevada Las  
Vegas**

**Las Vegas, NV, July 2022 – June 2023**

- Maintained a teaching load of four graduate-level courses on advanced statistical methods.

**Learning  
Analytics and  
Data Science  
Postdoctoral  
Fellow,**

**Las Vegas, NV, July 2019 – July 2022**

- Led STEM educational data mining efforts using learning analytics data derived from multiple digital platforms for learning for NSF grant.

University of  
Nevada Las  
Vegas

- Coordinated collection and curation of learning behaviors in a platform that supported coordination of structured and unstructured data and affords analysis via machine learning methods.
- Designed, implemented, and evaluated curriculum for college students through analysis of student engagement and interaction within the learning management system.
- Made data-driven decisions about the layout and design of course content.
- Analyzed fidelity of intervention through multivariate, longitudinal, and hierarchical statistical methods.
- Reported data using data software, such as MS SQL, SPSS, RStudio, Mplus, SAS, and STATA.

**Senior  
Institutional  
Research  
Analyst,**

Nevada State  
College

**Henderson, NV, July 2018 — July 2019**

- Utilized business intelligence software to extract, transform, and load data in the data warehouse.
- Managed structured and unstructured data from Oracle's PeopleSoft, web applications, and across several academic departments.
- Validated institutional research data while ensuring the completion and integrity of various datasets within the data warehouse.
- Collected, processed, and analyzed data using data software, such as MS SQL, SPSS, RStudio, and Mplus.
- Prepared state and federal data reports.
- Created reports in R Markdown.
- Designed innovative data visualization dashboards in Tableau.

**Instructor,**

University of  
Nevada Las  
Vegas

**Las Vegas, NV, July 2013 – July 2022**

- Maintained a teaching load of 1 - 4 undergraduate and graduate-level courses on educational psychology, classroom assessment, and advanced statistical methods.

## ACADEMIC HONORS AND AWARDS

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2021 LASER Institute Scholar Workshop Funding, North Carolina State University  
2019 American Educational Research Association Graduate Student Research Award  
2018 American Educational Research Association Graduate Student Research Award  
2018 Graduate & Professional Student Association Poster Award, UNLV

Publications and conference presentations are available upon request.

## **ASSURANCE STATEMENT**

The work described in the proposal will be conducted by staff listed above. The individuals in the project team will perform the duties and activities detailed in the scope of work for the full term of engagement. No substitutions or reassignments of these key personnel will be made without obtaining prior written approval of the County.

## 3.10. References

Two references are listed below, both from public agencies.

1. **Marlon Washington, M.S.**, *Chief Probation Officer*  
County of Marin – Probation Department  
3501 Civic Center Drive, RM 265, San Rafael, CA, 94903  
[marlon.washington@marincounty.gov](mailto:marlon.washington@marincounty.gov)  
(415) 473-6662

2. **Christian Lucchesi**, *Research Data Specialist II*  
Office of Youth & Community Restoration (OYCR)  
California Health and Human Services Agency  
925 L Street, Suite 1275, Sacramento, CA 95814  
[Christian.Lucchesi@CHHS.CA.GOV](mailto:Christian.Lucchesi@CHHS.CA.GOV)  
(916) 639-8051





### 3.11 Fee Proposal

	Target Timeline	2026 Hours	2026 Cost	2027 Hours	2027 Cost	2028 Hours	2028 Cost	2029 Hours	2029 Cost	2030 Hours	2030 Cost	Total	
		Rate: \$175		Rate: \$175		Rate: \$180		Rate: \$180		Rate: \$185			
<b>Juvenile Services</b>													
<b>1</b>	<b>Meetings &amp; Collaboration</b>	<b>Jan-Dec</b>	<b>100</b>	<b>\$17,500</b>	<b>100</b>	<b>\$17,500</b>	<b>100</b>	<b>\$18,000</b>	<b>100</b>	<b>\$18,000</b>	<b>100</b>	<b>\$18,500</b>	<b>\$89,500</b>
	Monthly calls with Probation staff and other project communication and coordination (3 hrs, 2-3 staff)	Jan-Dec	72	\$12,600	72	\$12,600	72	\$12,960	72	\$12,960	72	\$13,320	\$64,440
	Quarterly CBO and JJCC meetings and prep (3.5 hrs, 2 staff)	Jan-Dec	28	\$4,900	28	\$4,900	28	\$5,040	28	\$5,040	28	\$5,180	\$25,060
<b>2</b>	<b>Update Annual Plans</b>	<b>Jan-Apr</b>	<b>75</b>	<b>\$13,125</b>	<b>60</b>	<b>\$10,500</b>	<b>60</b>	<b>\$10,800</b>	<b>60</b>	<b>\$10,800</b>	<b>60</b>	<b>\$11,100</b>	<b>\$56,325</b>
	JJCPA and YOBG Annual Plan: assist in developing plan	Jan-Apr	45	\$7,875	30	\$5,250	30	\$5,400	30	\$5,400	30	\$5,550	\$29,475
	JJRBG Annual Plan: assist in developing plan; facilitate the public process in collaboration with Probation at the JJCC Realignment	Jan-Apr	30	\$5,250	30	\$5,250	30	\$5,400	30	\$5,400	30	\$5,550	\$26,850
<b>3</b>	<b>Program Evaluation &amp; Annual Reports</b>	<b>Jan-Dec</b>	<b>570</b>	<b>\$99,750</b>	<b>530</b>	<b>\$92,750</b>	<b>530</b>	<b>\$95,400</b>	<b>530</b>	<b>\$95,400</b>	<b>530</b>	<b>\$98,050</b>	<b>\$481,350</b>
	CBO communication and technical assistance (e.g., creating evaluation tools, data collection training) for Probation programs and CBOs as needed	Jan-Dec	75	\$13,125	75	\$13,125	75	\$13,500	75	\$13,500	75	\$13,875	\$67,125
	Create streamlined data collection system for CBOs and Probation	May-Aug	40	\$7,000		\$0		\$0		\$0		\$0	\$7,000
	Collect, quality check, and analyze quantitative and qualitative data from Probation and CBOs	Jan-Dec	275	\$48,125	275	\$48,125	275	\$49,500	275	\$49,500	275	\$50,875	\$246,125
	Prepare 2 annual reports: JJRBG/YOBG; JJCPA/JPAF	Aug-Oct	160	\$28,000	160	\$28,000	160	\$28,800	160	\$28,800	160	\$29,600	\$143,200
	Prepare and deliver presentation of findings to the JJCC	Oct-Nov	20	\$3,500	20	\$3,500	20	\$3,600	20	\$3,600	20	\$3,700	\$17,900
<b>4</b>	<b>Evaluation of Existing Resources</b>	<b>May-Jun</b>	<b>24</b>	<b>\$4,200</b>	<b>24</b>	<b>\$4,200</b>	<b>24</b>	<b>\$4,320</b>	<b>24</b>	<b>\$4,320</b>	<b>70</b>	<b>\$12,950</b>	<b>\$29,990</b>
	Assess existing resources	May-Jun	16	\$2,800	16	\$2,800	16	\$2,880	16	\$2,880	40	\$7,400	\$18,760
	Update guide for youth (minor updates every year, fully update every 5 years)	May-Jun	8	\$1,400	8	\$1,400	8	\$1,440	8	\$1,440	30	\$5,550	\$11,230
<b>5</b>	<b>Local Action Plan (LAP) Development</b>	<b>Nov-Jun</b>	<b>100</b>	<b>\$17,500</b>	<b>24</b>	<b>\$4,200</b>	<b>20</b>	<b>\$3,600</b>	<b>50</b>	<b>\$9,000</b>	<b>605</b>	<b>\$111,925</b>	<b>\$146,225</b>
	Project design and management (launch, stage setting, timeline, and expectations)	Nov-May							10	\$1,800	25	\$4,625	\$6,425
	Data collection (stage setting listening sessions, focus groups, key informant interviews, provider survey)	Dec-Mar							20	\$3,600	220	\$40,700	\$44,300
	Data analysis and synthesis	Mar-Apr									180	\$33,300	\$33,300
	Local Action Plan report	Apr									100	\$18,500	\$18,500
	Create and present plan to JJCC	May									20	\$3,700	\$3,700
	RBA & dashboard of county-wide LAP progress	Jan-June	100	\$17,500	24	\$4,200	20	\$3,600	20	\$3,600	60	\$11,100	\$28,600
<b>6</b>	<b>Responsive Requests</b>	<b>Jan-Dec</b>	<b>20</b>	<b>\$3,500</b>	<b>20</b>	<b>\$3,500</b>	<b>30</b>	<b>\$5,400</b>	<b>30</b>	<b>\$5,400</b>	<b>30</b>	<b>\$5,550</b>	<b>\$23,350</b>
	Ad hoc research and evaluation requests/enhancements	Jan-Dec	20	\$3,500	20	\$3,500	30	\$5,400	30	\$5,400	30	\$5,550	\$23,350
<b>Juvenile Services Subtotal</b>			<b>889</b>	<b>\$155,575</b>	<b>758</b>	<b>\$132,650</b>	<b>764</b>	<b>\$137,520</b>	<b>794</b>	<b>\$142,920</b>	<b>1395</b>	<b>\$258,075</b>	<b>\$826,740</b>
Overhead (10%)				\$15,558		\$13,265		\$13,752		\$14,292		\$25,808	\$82,674
<b>Juvenile Services Total</b>			<b>889</b>	<b>\$171,133</b>	<b>758</b>	<b>\$145,915</b>	<b>764</b>	<b>\$151,272</b>	<b>794</b>	<b>\$157,212</b>	<b>1395</b>	<b>\$283,883</b>	<b>\$909,414</b>

### 3.11 Fee Proposal

	Target Timeline	2026 Hours	2026 Cost	2027 Hours	2027 Cost	2028 Hours	2028 Cost	2029 Hours	2029 Cost	2030 Hours	2030 Cost	Total	
<b>Adult Services</b>												\$0	
<b>1</b>	<b>Meetings &amp; Collaboration</b>	Jan-Dec	124	\$21,700	96	\$16,800	96	\$17,280	96	\$17,280	96	\$17,760	\$90,820
a	Monthly calls with Probation staff and other project coordination and communication, including a project kickoff and onboarding in Y1, Q1. Community Corrections Partnership (CCP) quarterly in person (6 hrs, 1 staff)	Jan-Dec	100	\$17,500	72	\$12,600	72	\$12,960	72	\$12,960	72	\$13,320	\$69,340
b		Jan-Dec	24	\$4,200	24	\$4,200	24	\$4,320	24	\$4,320	24	\$4,440	\$21,480
<b>2</b>	<b>Update Annual Plan</b>	Jan-Apr	48	\$8,400	25	\$4,375	25	\$4,500	25	\$4,500	25	\$4,625	\$26,400
a	CCP Local Implementation Plan: Assist in developing plan	Jan-Apr	48	\$8,400	25	\$4,375	25	\$4,500	25	\$4,500	25	\$4,625	\$26,400
<b>3</b>	<b>Evaluation of Existing Resources</b>	May-Jun	100	\$17,500	24	\$4,200	24	\$4,320	24	\$4,320	64	\$11,840	\$42,180
a	Assess existing resources	May-Jun	40	\$7,000	16	\$2,800	16	\$2,880	16	\$2,880	40	\$7,400	\$22,960
b	Create and update guide for adults (create in Y1, minor updates every year after)	May-Jun	60	\$10,500	8	\$1,400	8	\$1,440	8	\$1,440	24	\$4,440	\$19,220
<b>4</b>	<b>Responsive Requests</b>	Jan-Dec	16	\$2,800	0	\$0	0	\$0	0	\$0	0	\$0	\$2,800
a	Develop scope of adult evaluation needs	Jan-Dec	16	\$2,800									\$2,800
b	Ad hoc research and evaluation requests/enhancements (TBD)	Jan-Dec		\$0		\$0		\$0		\$0		\$0	\$0
<b>Adult Services Subtotal</b>			<b>288</b>	<b>\$50,400</b>	<b>145</b>	<b>\$25,375</b>	<b>145</b>	<b>\$26,100</b>	<b>145</b>	<b>\$26,100</b>	<b>185</b>	<b>\$34,225</b>	<b>\$162,200</b>
Overhead				\$5,040		\$2,538		\$2,610		\$2,610		\$3,423	\$16,220
<b>Adult Services Total</b>			<b>288</b>	<b>\$55,440</b>	<b>145</b>	<b>\$27,913</b>	<b>145</b>	<b>\$28,710</b>	<b>145</b>	<b>\$28,710</b>	<b>185</b>	<b>\$37,648</b>	<b>\$178,420</b>
<b>TOTAL FOR JUVENILE AND ADULT SERVICES</b>			<b>1177</b>	<b>\$226,573</b>	<b>903</b>	<b>\$173,828</b>	<b>909</b>	<b>\$179,982</b>	<b>939</b>	<b>\$185,922</b>	<b>1580</b>	<b>\$321,530</b>	<b>\$1,087,834</b>



County of San Mateo

## Probation

John T. Keene, Chief Probation Officer

400 County Center, Redwood City, CA 94063

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### [DATA IN ACTION, LLC] RESPONSE DOCUMENT REPORT

RFP No. 2025-RFP-00559

Research and Evaluation Services

RESPONSE DEADLINE: August 12, 2025 at 5:00 pm

Report Generated: Wednesday, August 13, 2025

### Data In Action, LLC Response

#### CONTACT INFORMATION

**Company:**

Data In Action, LLC

**Email:**

grants@datainaction.org

**Contact:**

Leslie Sullivan

**Address:**

3099 Griffon Street E

Danville, CA 94506

**Phone:**

(916) 764-8374

**Website:**

[www.datainaction.org](http://www.datainaction.org)

**Submission Date:**

Aug 12, 2025 4:59 PM (Pacific Time)

## ADDENDA CONFIRMATION

Addendum #1

*Confirmed Aug 12, 2025 3:32 AM by Leslie Sullivan*

## QUESTIONNAIRE

### 1. Minimum Qualifications

HAS THE PROPOSER BEEN PROVIDING SIMILAR SERVICES FOR A MINIMUM OF FOUR (4) YEARS WITHIN THE LAST SEVEN (7) YEARS?\*

Yes

DOES THE PROGRAM MANAGER HAVE A MINIMUM OF TWO (2) YEARS OF EXPERIENCE WITHIN THE LAST FIVE (5) YEARS IN MANAGING PROGRAMS OF THIS SIZE?\*

Yes

PLEASE CONFIRM YOUR FIRM IS REGISTERED WITH SYSTEM FOR AWARD MANAGEMENT (SAM)\*

[SAM.gov](https://sam.gov)

Confirmed

WHAT IS THE REGISTERED BUSINESS NAME AND UNIQUE ENTITY ID (UEI) NO.?\*

- UEI number can be obtained by registering your business through SAM.GOV
- Should you be in the process of obtaining your UEI number, please enter the digits '123' temporarily for your response below in order to proceed with proposal. This temporary number should be replaced with the correct registration number for submission of the proposal.

Registered Business Name: Data in Action, LLC Unique Entity ID No.: LPH8JBXAGBX4

## 2. Procurement Preference for Local Businesses and Local Non-Profits

IS THE PROPOSER A "LOCAL BUSINESS"?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code, a "Local Business" means any for-profit business which has its principal place of business, or is headquartered, in San Mateo County. If this designation applies to the proposer, a self-attestation form must be completed and provided with this response.

Please download the below documents, complete, and upload. If this designation is not applicable, please leave blank.

- [SMC LocalBusiness self-atte...](#)

No response submitted

IS THE PROPOSER A NON-PROFIT?\*

A Non-Profit is defined as a tax-exempt public charity organization (within the meaning of section 501(c)(3) of the Internal Revenue Code) that is formed for purposes other than making a profit, is exempt from paying federal income taxes on the income generated for their exempt purposes.

No

IS THE PROPOSER A LOCAL "SMALL" OR "MICRO" BUSINESS?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code:

"Small Business" means any business which holds a Small Business Certification awarded by the California Office of Small Business and Disabled Veteran Business Enterprise Services (OSDS).

"Micro Business" means any Small Business certified by the OSDS which is automatically designated by the OSDS as a Micro Business due to gross annual receipts falling below the OSDS-designated dollar amount.

If the above designations apply, please provide the OSDS provided Certification ID.

If this designation is not applicable, please leave blank.

No.

IS THE PROPOSER A LOCAL "SMALL" OR "MICRO" NON-PROFIT?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code:

“Small Non-Profit” means a Local Non-Profit with an annual revenue of \$1,000,000 to \$2,500,000 according to its most recently filed IRS Form 990.

“Micro Non-Profit” means a Local Non-Profit with an annual revenue of less than \$1,000,000, according to its most recently filed IRS Form 990.

If the above designations apply, please provide your latest filed IRS form 990. A filing from the last two calendar years is acceptable.

If this designation is not applicable, please leave blank.

No response submitted

### 3. Technical Proposal

INTRODUCTION AND EXECUTIVE SUMMARY \*

Submit a letter of introduction and executive summary of the proposal. The letter must contain:

- Name, title and contact information (email, phone, and address) for representative of proposer that is responsible for communication related to this RFP.
- Name, title, contact information, and signature of person authorized to obligate firm to perform the commitment contained in the proposal.

Submission of the letter will constitute a representation by proposer that it is willing and able to perform the commitments contained in the proposal and has not violated the terms of this RFP.

3.1\_Introduction\_and\_Executive\_Summary.pdf

STATEMENT OF MINIMUM QUALIFICATIONS \*

Describe how the proposer meets the minimum qualifications as set forth in **Minimum Qualifications** of this RFP.

Submission of the Minimum Qualifications checklist is not a substitute for providing a detailed written response.

### 3.2 Statement of Minimum Qualifications

DNA Global meets and exceeds RFP’s minimum qualifications, bringing more than 28 years of experience providing research, evaluation, and planning services for justice, behavioral health, and cross-sector public systems. We have conducted similar work for over a decade in California and nationally, with extensive expertise in program evaluation, data collection, technical assistance, and strategic planning for juvenile and adult justice systems. Deeply rooted in diversity, equity and inclusion, our work aligns directly with the scope described in this RFP and includes over 15 large-scale federally or locally funded research, evaluation and planning projects in justice and public safety systems.

Our program managers and senior evaluation staff have well over the required two years of recent experience managing projects of comparable size and complexity, overseeing multi-year, multi-county evaluations funded by JJCPA, YOBG, JIRBG, JPAF, BSCC, DOJ, SAMHSA, CDPH, and philanthropic foundations. Operating as DNA Global for the past 12 years, we have successfully partnered with counties including Alameda, Sonoma, Santa Clara, and Los Angeles to evaluate juvenile justice reforms, develop Local Action Plans, assess Adult and Pretrial Services programs, and facilitate public engagement processes. Our work includes managing data from multiple community-based organizations, producing public-facing reports, and providing actionable recommendations for continuous system improvement.

We are registered with the System for Award Management (SAM.gov) under the following information: **Business Name:** Data in Action, LLC (dba DNA Global), **DUNS/UEI:** 79391789/ LPH8JBXAGBX4.

Our record demonstrates the capacity, experience, and commitment required to support San Mateo County’s evaluation needs, advance data-driven decision-making, and promote equitable outcomes for youth, families, and communities. Our team brings more than 28 years of experience conducting rigorous, equity-driven, and culturally responsive evaluations focused on cross-sector public systems transformation, including probation departments, justice systems, behavioral health, reentry initiatives, youth development, education, and crisis response. We have extensive expertise evaluating justice reform efforts, Local Action Plan (LAP) development, JIRBG/JJCPA/YOBG-funded programs, and cross-agency initiatives—making us well-suited to support San Mateo County’s evaluation, reporting, and strategic planning needs.

Over the last 12 years operating as DNA Global, we have successfully partnered with counties across California—including Alameda, Sonoma, and Santa Clara—to deliver evaluations aligned with the Board of State and Community Corrections (BSCC), the California Department of Corrections and Rehabilitation, SAMHSA, the U.S. Department of Justice (DOJ), and other state and federally funded initiatives, as well as justice systems in other states.

We have a proven record of working with Health and Human Services (HHS) departments, probation agencies, behavioral health divisions, public hospitals, and community-based organizations to design and implement evaluations that are trauma-informed, equity-centered, and grounded in real-world operational conditions. DNA Global also has an extensive history of partnering with youth, families, and communities most impacted by system inequities and structural disparities. We maintain long-standing relationships with California HHS departments and behavioral health divisions, and have supported projects funded by BSCC, DOJ, SAMHSA, the California Department of Public Health (CDPH), and philanthropic foundations. Our experience delivering evaluation services highly similar to this RFP across California ensures our ability to meet the County's requirements and produce meaningful, actionable results. (See Appendix for List of Relevant Projects.)

- **Sonoma County AB109/CCP Public Safety Realignment Evaluation (2023-2029):** Six-part justice evaluation, starting with a rigorous validation study of a Static Risk Needs Assessment Tool utilized by probation for supervision decision-making, where we assessed fidelity, equity and predictive validity using data from 12 years of 19,000 cases.
- **Alameda County SB 823 Block Grant Evaluation (2024-2025):** We conducted a assessment, data collection including key stakeholder interviews, surveys and document and lit reviews, and secondary data analysis to develop a comprehensive state-aligned annual plan, leveraging existing data, stakeholder input, national evidence-base, and addressing major gaps in past plans. Well-received.
- **Alameda County SRNA Tool Validation, Smart Supervision Evaluation, and AC Juvenile Justice Center Strategic Planning and evaluation/TA:** Assessed the implementation and outcomes of risk/needs tools, cognitive behavioral therapy models, and behavioral health linkages. In Alameda County, we conducted a multi-year process evaluation of the Smart Supervision initiative, which involved extensive officer training evaluation, system-level coordination, and strategic data use to improve supervision practices. These projects demonstrate sustained, relevant experience conducting complex, multi-agency evaluations within probation and criminal justice systems.
- **State (CA) Department of Community Corrections-funded (BSCC) Alternatives to Detention Evening Reporting Center Evaluation, Alameda County Probation.** We led the design and implementation of alternatives to detention evaluation, obtaining and analyzing data from mixed methods, in partnership with government and youth CBOs.

- **Children’s Mental Health System of Care Evaluation in Alameda County (SAMHSA):** Oversaw 9 concurrent evaluation studies of behavioral health clinics and crisis services, including fidelity, youth outcomes, peer support models, and family engagement.
- **Violence Prevention data analysis, planning and evaluation for decades including Care Coaching Evaluation, and Project New Start (Tattoo Removal) Program Evaluation** as well as Homicide Profile, Youth Health Status Profile, Violence Prevention Blueprint, among others in Alameda County Public Health Department/CAPE Unit (led by Dr. Jain), EPIC alcohol use among youth-led survey, ex-gang members recovery and service delivery, violence prevention triangulating data across sources, mixed methods, etc.
- **Restorative Justice and Youth Violence Prevention Projects:** In Oakland Unified with HCSA, City of Oakland, evaluated trauma-informed programs to reduce harm and increase access to crisis alternatives. Evaluated implementation fidelity and outcomes of restorative justice practices on student behavior, school climate, and racial disparities.
- **Second Chance Reentry Evaluations (Juvenile & Adult):** For multiple jurisdictions, DNA Global evaluated wraparound reentry services with outcomes related to recidivism, education, housing, and employment.
- **Young Men United, United Way:** DNA Global conducted a formative process and outcome evaluation using a mixed-methods, Results-Based Accountability (RBA) framework. The evaluation assessed implementation quality, participant engagement, and early indicators of success. Data sources included youth surveys, stakeholder interviews, program documentation, and partner feedback. Although data access was limited, early findings demonstrate high retention, increased confidence, college and job placements, and reduced disengagement.

In addition to the above, Dr. Jain has led over 80 high-quality, rigorous, and meaningful evaluations locally and nationally, specifically, 15 large-scale multi-site state and federal initiatives. These initiatives required collaborating closely with justice systems, probation departments, juvenile courts, public defenders, schools, behavioral health, and community-based service providers. We have conducted a Smart Supervision Evaluation for Alameda County, SRNA Tool Validations for multiple jurisdictions, an NIJ-funded Resilience Study, an Evening Reporting Center/Diversion Evaluation, Juvenile and Adult Reentry Evaluations, and Race and Gender Decision-Point Analysis across entire local justice systems, in addition to others (see List of sample projects in Appendix C). Also, see other Senior Researcher (Dr. Hollie MacDonald) and Sr. Advisors (Dr. Petrosino and Williams)'s exemplary justice-related research and evaluation work over the last few decades.

The DNA Global team has expertise in implementing both qualitative and quantitative methodologies for data collection and analysis. We have led evaluations and studies using a variety of designs, including but not limited to randomized control trials, quasi-experimental studies, case studies, participatory action research, and survey research. We also employ multivariate statistical methodologies, including hierarchical linear modeling, structural equation modeling, linear and logistic regression modeling, exploratory and confirmatory factor analysis, cluster analysis, and principal components analysis, to name a few. One of our strengths is designing data collection methods to capture data from culturally diverse populations on sensitive topics, yielding successful response rates and meaningful data.

DNA Global has experience implementing **Local Evaluation Plans (LEPs) and Local Evaluation Reports (LERs)** for San Mateo County justice programs, and understands the rigorous documentation, data planning, and goal alignment expected. Our team has expertise in:

- Developing performance measures aligned to specific adult or juvenile program goals and objectives, as well as several related locally, state-wide, and federally-funded violence prevention evaluations, gun violence reduction initiatives, behavioral health care system measures, recidivism studies, tattoo removal recovery of gang members, county homicide profiles and trends, and disparities analysis by race, gender, age, and other strata.
- Designing equity-focused culturally responsive data collection plans, data dictionaries, and metadata schemas across county systems, and triangulating data from multiple data sources.
- Supporting counties with **data security** planning, sharing agreements, and HIPAA compliance, obtaining IRB approval or exemption, ensuring subject privacy and confidentiality, and sharing results in an agreement in a meaningful and compelling manner to influence policymakers.
- Completing BSCC-formatted and many similar projects' final evaluation reports that incorporate both fidelity measures and community impact outcomes.

**Complex Data Management and Reporting Capacity:** We are a highly qualified and experienced research team with subject matter expertise in-house, with robust capacity and growing infrastructure to manage large, complex datasets while maintaining strict data governance and security protocols. Our data systems expertise includes:

- Use of Excel, SPSS, Stata, R, Salesforce, and Power BI for data collection, visualization, and dashboard development (Macdonald, Hwang, Mizoguchi, tech support).

- Secure data storage (encrypted, password protected, security measures), and multi-level data access management, cleaning, and analysis.
- Development of fidelity to implementation tools and performance dashboards to monitor implementation of crisis response services and equity measures. We have deep expertise in measuring intermediate outcomes, developing, and applying logic models, mapping pathways to systems change, and creating implementation fidelity checklists. Our approach is grounded in both national and local evidence bases and informed by validated measurement scales, program guidebooks, and stakeholder input.
- Technical assistance for county staff to build data literacy, interpret evaluation findings, and inform policy or budgetary decisions. We have developed and given numerous trainings, and ongoing one-on-one, or CBO-specific, technical assistance to ensure quality data collection that merges current data culture with future goals.

#### PROJECT APPROACH\*

This section should correlate to the Scope of Work . Proposer should give a short summary describing how it will perform the relevant work

#### 3.3. Project Approach\*

DNA Global will fulfill the Scope of Work by applying a proven, equity-centered, and collaborative evaluation approach developed and refined through similar county projects, including our recent work with the Sonoma County Probation Department and Alameda County's Smart Supervision Initiative. These efforts involved comprehensive planning, tool validation, system-wide evaluations, and strategic reporting, each of which aligns directly with San Mateo County's requirements.

Our methodology combines mixed-methods evaluation, implementation science, and results-based accountability frameworks. For San Mateo, we will deploy an adaptive, stakeholder-driven process that ensures meaningful use of data to inform decision-making, planning, and reporting at each stage of the project.

**Plan for achieving performance measures. How DNA Global will ensure its ability to complete the project and submit deliverables within the agreed upon time frames.**

**Overall Approach to develop an equitable evaluation**

DNA will use an equity-centered, strengths-based evaluation approach to conduct a comprehensive and rigorous process and outcome evaluations of San Mateo BHRS programs as needed. We use the **Results-based Accountability (RBA), Empowerment Evaluation, and Implementation Science** frameworks to measure implementation and effectiveness. *“Not all that counts can be measured, and not all that is measured should be counted,”* thus, it is crucial to use overarching frameworks to guide priorities. *RBA* will guide the development of evaluation questions and help to revise the existing programs’ logic model, which starts with the ends in mind (results/goals) and works backward to identify strategies and activities that support implementation. *RBA* will help challenge underlying assumptions that can be barriers to innovation, encourages system-wide cooperation, and uses intermediate outcomes, which are more commonplace and powerful to track and achieve in systems change initiatives. *Implementation Science* will help better understand why things are happening, providing specific insights on internal organizational factors, and external partner perspective. We will leverage existing local and if appropriate, state or national data (for comparison or context), tools, and lessons learned, addressing gaps in past evaluations to align with the new logic model.

The current system of care theory of change will be refined in collaboration with evaluation advisory and latest evidence-base and theories (e.g., social determinants of health, risk and resilience, trauma-informed). An accompanying simple one-page evaluation logic model will be refined per *RBA* that starts with the ends in mind (results/goals) and works backwards to identify strategies and activities that support implementation. Dr. Jain is an Adjunct Clinical Professor at UC Davis, and we have partnered with community IRB in the past to obtain IRB approval for ACBHCS SAMHSA-grant evaluation. For Outcome evaluation, we propose a *Quasi-Experimental, Pre-Post Comparison Group evaluation design*, comparing key outcomes of mental health consumers who complete the programs vs. not (to be decided). A comparison group for state/another entity may also be utilized (matched on demographics, risks, not served by the program or delayed entry). We will work closely with SM BHRS and partners with a monthly Evaluation Advisory committee, leveraging existing committees, data and efforts.

#### A. Data Collection Infrastructure and Management

Guided by the overall **RBA and Implementation Science** frameworks, we will aim to answer key evaluation questions on what you are doing, how well you are doing it, and what difference you are making. Both quantitative and qualitative data will be collected using culturally responsive mixed methods, leveraging existing data and other program and county data, tools, and past local and national evidence-base.

First year, our focus will be exploratory, emphasizing process evaluation to document the bigger picture and development of key components of the four programs, aligned with key goals and objectives. Given the importance of high fidelity to implementation before measuring associated outcomes, our priorities will include:

- Measuring implementation of key activities towards set objectives.
- Assess quality of services (fidelity)
- Assessing cross-sector collaboration and capacity building.
- Establish baseline outcomes at the participant, family and program levels.
- Conduct a special study on why justice-involved clients continue to be incarcerated vs referred for mental health services.

Data collection may include: 1) focus groups with impacted communities and partners and providers, 2) Key stakeholder interviews capturing diverse partners and voices, 3) Document reviews, 4) case studies, 5) interagency collaboration survey, 6) program participant survey.

**Quality Control and Data Analysis:** A detailed quality control plan will ensure rigorous checks for all data collected, which will be cleaned, coded, and analyzed according to best practices. Final reports will undergo thorough review for accuracy, formatting, and grammar. To safeguard data security, all information will be encrypted, and password protected, using high-security anti-virus software and secure filing systems for data sharing. Any inquiries regarding the data will be promptly addressed with transparency. Data analysis will be conducted using SPSS or SAS, starting with descriptive and trend analysis, followed by examinations of racial/ethnic/gender disparities and regression models. Advanced statistical techniques will be employed to delve deeper into contextual factors and their relationships with outcomes, surpassing basic descriptive analysis.

### **Reporting and Dissemination**

Each task has specific responsibilities, dependencies and milestones to ensure smooth implementation. We are fully prepared and available to take on this evaluation and meet all noted requirements in the RFP. To ensure successful completion of evaluation deliverables, San Mateo BHRS and DNA staff must fulfill respective roles and responsibilities in a timely manner. The primary responsibilities of Alameda County Health staff will include: 1) Facilitating timely access to necessary documents, data, key stakeholders, and committees, 2) Providing timely, constructive reviews and feedback, and 3) Strategizing the best approach for data collection, including specific units, staffing, tools, and reports to ensure a user-friendly and meaningful process, and 4) Sharing insights on local Lancaster context and system. DNA will oversee and manage all aspects of the evaluation including design, tools, reports, and presentations. We believe that mutual respect, understanding, and shared accountability are essential for the successful collaboration between SMC BHRS, key partners and DNA.

The evaluation plan will be a living breathing document updated annually, incorporating constructive feedback, and adhering to the highest ethical standards, data security, privacy and integrity, HIPAA regulations, and evaluation best practices per American Evaluation Association. It will outline the evaluation design aligning with the program's strategic plan and MHSA 3-year plan, delineate a simple RBA-informed logic model, and how goals and objectives will be measured and achieved using culturally responsive mixed methods. All documents will be systematically organized, carefully double-checked, and meet all requirements to ensure high quality, professionalism, and comprehensiveness. Our quarterly evaluation briefs will be formatted using RBA evaluation questions, incorporating narrative and stories along with numerical data.

Annual evaluation report and cumulative report will be prepared, providing in-depth results organized by evaluation questions, tracking the progress, performance, and participant outcomes. Year 1 will focus on process evaluation or formative, and years 2 and 3 will be outcome and summative evaluation focused. Technical details will be included in the appendices. All reports will include data visualization techniques, along with clear and concise narratives, organized by goals and objectives. Insights will be shared and highlighted. Our graphic designer, ethical AI, and software will be utilized to present compelling findings, along with an executive summary, and appropriate presentation, and dissemination methods appropriate for diverse audiences. We use Technology of Participation (ToPs) facilitation methods to disseminate and facilitate dialogue across partners, ensuring understanding and implementation of results and recommendations.

**Communication and Collaboration:** Throughout, we will ensure client satisfaction by checking in regularly with the program coordinator, maintain ongoing, structured dialogue and clear communication. We have demonstrated high satisfaction with similar city and county-wide evaluations, with nuanced lessons learned that are routinely incorporated to improve our services. Meeting client needs with sensitivity and professionalism, starting with where they are, is our highest priority. Transparency, high quality, mutual respect, and clear expectations regarding the shared timeline, deliverables, and roles are of utmost importance.

**Any notable innovations or improvements that you can provide (with respect to, for example efficiency, technology and sustainability, etc.)**

- **Efficiency:** leverage human capital and knowledge of evidence-based practices, validated measurement tools and instruments, relevant scales (national and local), theories of human development, organizational assessments and systems change will save time and effort. 2) We bring passion, commitment and decades of multi-disciplinary experience working across sectors (behavioral health-public health-justice-education-social services) for decades strongly aligning with the values and implementing what San Mateo BHRS is hoping to implement – thus we will bring years of lessons learned of putting data into

practice4) creating short evaluation briefs, fast facts and presentation decks with data visualization techniques and ToPs facilitation methods to reach and engage diverse community, families impacted and partners. We also have been acknowledged for creating simple meaningful CQI reports with compelling data visualization infographics and fast facts we specialize in. We also bring academic level national research expertise in mental health, public health and equity, social determinants of health, with access to top mental health experts from Harvard and Northeastern that will save time in developing cutting-edge evaluation plans, designs, methods, and instruments. We have in-depth knowledge for instance of wellness/resilience symptomology to diagnostic disorders measurement tools/ CBCL.

- **Technology:** Using technology, salesforce, and dashboards that streamline data collection, sharing of results/reports for use by diverse stakeholders across agencies in a timely high-quality meaningful manner.
- **Empowerment approach:** We are inherently community-based, and strength-based. We see impacted communities as our greatest asset; and use creative culturally relevant diverse staff, who have lived experience and been through the mental health system of care, to conduct our interviews, and focus groups; with notably high response rates.
- **Sustainability:** we have structures, processes, systems in place that have worked well for many similar clients and counties over the years. We build relationships with our clients, understand leadership priorities, listen deeply and ensure key stakeholders and communities impacted are involved and actively engaged throughout the project. We use creative, culturally-responsive methods, collaborative, participatory empowerment evaluation approaches to identify, measure and celebrate strengths to address gaps.

#### SCOPE OF WORK TASKS/MILESTONES\*

Describe your proposed approach to tasks/milestones

#### 3.4. Scope of Work Tasks/Milestones

**Section 2.1.A.** Under the guidance of the San Mateo County Probation Department, DNA Global will conduct a comprehensive, equity-informed assessment of the effectiveness of juvenile programs operated by or under contract with the department (for example, contracted community-based organizations (CBOs)). This work will build upon our successful evaluation frameworks used in Sonoma and Alameda Counties, where we assessed program fidelity, participant outcomes, and system alignment across multiple juvenile justice service providers.

Our approach to assessing **program effectiveness** will include:

- Clarifying program goals and logic models through document review, interviews, and CBO consultations
- Aligning outcome measures with those established by the Probation Department, JJCC, and BSCC funding streams
- Tracking progress against defined outputs and outcomes, including changes in client behavior, engagement levels, recidivism-related indicators, and skill development
- Conducting site visits, staff interviews, and focus groups with CBO staff and youth participants to capture implementation fidelity, barriers to success, and contextual factors affecting program delivery
- Incorporating client voice into the evaluation by collecting participant feedback and success stories, particularly from youth populations historically marginalized in justice systems

Effectiveness will be assessed both quantitatively (e.g., dosage, completion rates, and outcomes) and qualitatively (e.g., youth engagement, staff observations, and perceived impact), with attention to equity and access across race, gender, and geography. Findings will be synthesized in program-level summaries and integrated into the broader annual reports, allowing for comparisons, identification of promising practices, and actionable recommendations for continuous improvement. By grounding the evaluation in local context and data-use readiness, DNA Global will ensure that the assessment of program effectiveness informs both contract monitoring and strategic investment in juvenile justice services.

#### **Quantitative and Qualitative Data Collection Methods:**

*In Reference to RFP section 2.1.B.* DNA Global will lead a structured and collaborative process to collect and analyze quantitative and qualitative data from approximately 12 community-based organizations (CBOs) funded through JJCPA, JPAF, YOBG, JJRBG, and other relevant sources. Our approach is grounded in methods we successfully used in Sonoma County's probation tool validation and Alameda County's Smart Supervision evaluation, where we supported a diverse portfolio of partners in capturing data that is both meaningful and actionable.

In collaboration with Probation and CBO partners, we will collect and analyze the following categories of **data**:

- A. Program Dosage: We will gather detailed service data including number of sessions, hours per participant, duration of engagement, and completion rates. When applicable, we will align this with risk levels or presenting needs to understand dosage-effectiveness relationships.

- B. Demographics of Clients Served: CBOs will report on core demographic variables, race/ethnicity, age, gender identity, zip code, primary language, and referral source. We will disaggregate outcomes across these variables to support equity-focused analysis.
- C. Relevant Outcomes Based on Established Performance Measures: We will work with Probation to align each CBO's outcomes with established program-specific and County-wide performance indicators. These may include:
  - o Reductions in justice system involvement
  - o School attendance or engagement metrics
  - o Behavioral improvements or goal achievement
  - o Client satisfaction or readiness indicators
- D. Program Strengths and Challenges: Using structured interviews, fidelity tools, and staff surveys, we will assess implementation quality, organizational capacity, and contextual barriers. This supports both continuous improvement and investment planning.
- E. Client Success Stories: We will collect narrative data via client interviews, testimonials, and brief written prompts, highlighting individual transformation, resilience, and community impact. These stories will be included in the public-facing reports to ensure the human experience is centered alongside performance metrics.

Our evaluation team will use secure and standardized templates to ensure consistent data collection across CBOs while remaining flexible to each organization's capacity and data systems. We will provide technical assistance as needed to improve data quality and completeness, while building trust and transparency with provider partners. Further, all collected data will be synthesized into analytic memos, visualizations, and narratives that feed into the County's annual reports and inform evidence-based decision-making.

#### **Creation of Surveys:**

*In Reference to RFP Section 2.1.C.* To support high-quality, targeted data collection, DNA Global will assist with the creation of surveys tailored to San Mateo County's juvenile justice programs and evaluation needs. Drawing on best practices from our prior work in Alameda and Sonoma Counties, we will co-develop surveys that are clear, culturally responsive, and aligned with performance measures established by the Probation Department and JJCC.

We will design surveys to support:

- Participant feedback, including client satisfaction, service accessibility, and perceived impact
- Staff experience and fidelity, capturing how well programs adhere to evidence-based practices
- Program-specific outcomes, such as knowledge gains, behavior change, or readiness for transition
- Equity and inclusion assessments, including client-reported barriers, service gaps, and cultural responsiveness

Surveys will be developed in collaboration with San Mateo County Probation program leadership, key stakeholders, and CBOs to ensure relevance and usability. We will also support translation, accessibility formatting, and digital/mobile deployment as needed. Where appropriate, DNA Global will provide training or written guidance to CBOs on administering surveys and interpreting findings. By integrating these survey tools into the overall evaluation framework, we ensure that the data collected meaningfully informs continuous improvement, reporting, and strategic planning across the County’s juvenile justice system.

*In reference to RFP 2.1.D*, DNA Global will work directly with each funded community-based organization (CBO) to build a strong foundation for high-quality, consistent data collection and the effective use of evidence-based assessment tools. Our team has successfully delivered similar technical assistance in Sonoma and Alameda Counties, where we worked with providers of varying sizes and capacities to support data literacy, tool implementation, and continuous improvement.

We will begin with one-on-one onboarding meetings with each CBO to understand their service model, current data collection practices, and evaluation readiness. Based on this, we will tailor support that includes:

**A. Quality Data Collection**

- Provide user-friendly data templates aligned with required indicators
- Offer guidance on tracking dosage, attendance, demographics, and outcomes
- Troubleshoot data entry and management challenges in real time
- Train CBO staff on strategies to improve data accuracy and completeness
- Develop simple documentation protocols for narrative or qualitative data

**B. Evidence-Based Assessment Tools**

- Support CBOs in selecting or refining tools that align with their program goals (e.g., behavioral screening, readiness scales, risk/resiliency tools)
- Offer guidance on administration timing, scoring, and interpretation
- Ensure that tools are age-appropriate, trauma-informed, and culturally responsive
- Integrate assessments into overall program logic models and reporting frameworks

Throughout the year, we will maintain regular communication with CBOs via check-ins, group training (as needed), and a Q&A communication system. Our approach is strengths-based and supportive, designed to empower CBOs to better understand and communicate their impact while contributing meaningfully to County-wide reporting and evaluation efforts.

#### **RFP 2.1.E and F, Annual Reports and Presentations:**

Under the direction of the San Mateo County Probation Department, DNA Global will produce two clear, accessible, and data-informed annual reports, one focused on YOBG and JIRBG programs, and the other on JJCPA and JPAF programs, alongside corresponding presentation materials for the Juvenile Justice Coordinating Council (JJCC).

From the outset of the project, all activities, including CBO engagement, technical assistance, survey development, fidelity tracking, and outcome analysis, will be strategically designed to feed into these reports. Our project structure emphasizes efficiency, integration, and clarity, ensuring that data collection and analysis are purposeful, streamlined, and responsive to County needs.

Each annual report will:

- Summarize program-level outputs and outcomes
- Present disaggregated data on participant demographics and service dosage
- Highlight progress toward established performance measures
- Surface implementation strengths, challenges, and equity considerations
- Feature narrative elements such as client success stories and promising practices

To ensure alignment with the County’s goals for transparency and public accountability, the reports will be written in clear, non-technical language and formatted for ease of understanding. Visual elements (charts, infographics, success spotlights) will be incorporated to support accessibility and engagement across diverse audiences.

In addition to the full reports, DNA Global will develop:

- Slide decks summarizing key findings for use in JJCC and public meetings
- One-page summaries or infographics to support broad dissemination
- Talking points and framing guidance for County leadership

All materials will be tailored to San Mateo’s existing reporting structure and modeled on effective public-facing deliverables we have produced in Sonoma and Alameda Counties. Throughout the year, we will maintain a continuous documentation and analysis process to ensure that report production is not reactive, but built systematically through the life of the project. This integrated approach ensures that annual reporting is not an isolated task, but the culmination of a thoughtfully executed evaluation strategy, one designed to support data-driven decision-making, continuous improvement in juvenile services, and increased public trust in the County’s justice system.

### ***Local Action Plan Development***

*In Reference to RFP sections 2.2.A and 2.2.B*, DNA Global proposes to serve as the San Mateo County Probation Department’s strategic partner in developing its 2030–2035 Local Action Plan (LAP), a forward-looking, equity-driven framework to guide the County’s response to juvenile crime and investment in prevention, intervention, and system reform.

Drawing on our successful work in Sonoma, Alameda and many other Counties, we will implement a collaborative, data-informed planning process that integrates stakeholder insight, best practices, and actionable strategies. From project kickoff through final delivery, all activities will be organized around the LAP deliverables to ensure efficiency, clarity, and alignment.

Our methodology will address each required LAP element through the following:

- Assessment of Local Resources: Mapping youth-serving services across sectors (education, mental health, diversion, etc.) to identify existing capacity, equity gaps, and investment opportunities.

- Identification of High-Risk Areas: Using geospatial and justice system data to highlight neighborhoods with concentrated need; supplemented by community and provider input.
- Juvenile Justice Action Strategy: Facilitating cross-sector collaboration to co-develop a coordinated action strategy focused on early intervention, racial equity, and behavioral health.
- Information Sharing & Performance Measures: Recommending practical inter-agency data strategies and a SMART-aligned performance framework responsive to BSCC requirements.
- Data Systems Assessment: Evaluating current youth data infrastructure and offering scalable recommendations for oversight and transparency.
- Optional Elements: Working with stakeholders to define target populations and evidence-informed rehabilitation goals.
- Implementation Challenges & Recommendations: Identifying barriers and offering phased, actionable solutions for the full lifespan of the plan.

The final LAP will be:

- Strategically structured for both technical and public audiences
- Supported by visual data summaries and implementation tools
- Rooted in equity, inclusion, and long-term sustainability

Stakeholder input is foundational to the plan's legitimacy and impact. DNA Global will lead a structured and inclusive engagement process involving:

- Listening Sessions and Interviews with:
  - Juvenile Justice Coordinating Council (JJCC)
  - Probation leadership
  - Funded CBOs
  - Schools, courts, law enforcement, youth/family reps

Sessions will be designed to: 1) Highlight system strengths and coordination gaps, 2) Generate ideas for performance indicators and shared goals, and 3) Build trust and buy-in for the LAP's direction. All qualitative data will be recorded, coded, and analyzed using rapid content analysis methods. Key themes will be disaggregated and mapped to relevant LAP sections, directly informing 1) Resource assessments, 2) Equity and data system recommendations, and 3) Strategy and implementation priorities. Through this combined approach, DNA Global will deliver a high-impact LAP that is actionable, aligned, and deeply reflective of San Mateo County's community priorities and system-wide expertise.

### ***Evaluation of Existing Resources***

*In reference to RFP Section 2.3.A*, DNA Global will conduct a comprehensive, system-level assessment of existing services across the San Mateo County Probation Department's core divisions: Juvenile Services, Institutions, Adult Services, and Pretrial Services. This cross-divisional analysis will help identify gaps, redundancies, and opportunities for alignment with evidence-based practices and County priorities. Drawing from our experience conducting similar assessments in Alameda County (Smart Supervision Evaluation) and Sonoma County (SRNA Validation), we will apply a structured, mixed-methods approach that includes stakeholder input, data analysis, and policy review.

*In reference to RFP Section 2.3.B*, DNA Global will conduct a comprehensive evaluation of community-based and system-delivered resources available to Probation clients and individuals at risk of justice system involvement in San Mateo County. This work will inform strategic planning, resource alignment, and service integration across agencies and funding streams. Our team brings direct experience from conducting similar evaluations in Sonoma and Alameda Counties, where we assessed cross-sector investments in justice-involved and high-risk populations, using a multi-method framework that emphasizes equity, effectiveness, and community voice.

Using both quantitative and qualitative methods, we will assess the accessibility, coverage, quality, and coordination of resources across the following core areas:

- A. Law Enforcement and Probation
  - Supervision models, alternatives to detention, reentry programs, and community policing partnerships
  - Community engagement efforts and diversion opportunities tied to law enforcement and probation services
- B. Education

- School-based interventions, alternative education pathways, truancy prevention, and wraparound academic support
- Coordination between schools and the Probation Department to support reentry and reduce dropout risk

C. Mental Health

- Availability and accessibility of behavioral health services, including trauma-informed care, crisis response, and culturally competent counseling
- Integration of mental health supports within juvenile and adult supervision plans

D. Health

- Access to primary care, reproductive health, and preventative health services for justice-involved individuals and their families
- Linkages between health care providers and probation case management systems

E. Social Services

- Public benefits enrollment, housing assistance, food security, employment support, and case coordination
- Navigation support for clients with complex needs across agencies

F. Drugs and Alcohol

- Availability of prevention, outpatient, and residential treatment services
- Alignment with risk/needs assessments and incorporation into supervision or diversion plans

G. Batterers Intervention

- Evaluation of certified batterers intervention programs, including availability, completion rates, and alignment with sentencing or supervision mandates
- Cultural responsiveness and trauma-informed practices within domestic violence intervention programming

The resource evaluation will result in a narrative and visual report that outlines:

- The scope, reach, and alignment of current services

- Geographic and demographic access disparities
- Capacity and system navigation challenges
- Recommendations for improved coordination, investment, and referral pathways

This work will support the County's broader goals of improving service access, reducing justice system involvement, and promoting equitable outcomes across sectors.

*In reference to RFP section 2.4. C.*, DNA Global will support the development, design, and ongoing annual update of San Mateo County Probation's Youth and Family Resource Guide, ensuring the guide remains accurate, accessible, and aligned with community needs and County priorities.

Our team understands that the Resource Guide is a critical tool for youth, families, case managers, and providers to navigate services and make informed decisions. We will approach this deliverable with the same attention to clarity, usability, and stakeholder alignment that we bring to all public-facing materials.

As part of this process, DNA Global will contact listed agencies and service providers to verify:

- Program availability and eligibility criteria
- Contact details, service hours, and intake processes
- Languages offered and cultural considerations

We will also, in partnership with San Mateo Probation Staff and other stakeholders, identify and include new, relevant services, prioritizing those that address mental health, education, family reunification, housing, and culturally responsive support for historically underserved communities. While compiling the guide, we will track areas where resource coverage is thin (e.g., geography, language access, age group) and provide a brief memo to Probation with recommendations for new partnerships or areas to monitor. To improve readability and relevance, we will engage youth and family representatives to review draft layouts and language. Their input will guide enhancements to format, terminology, and accessibility. In order to encourage access and utilization, we will format the guide to be:

- User-friendly, with icons, categorization, and plain-language summaries
- Digitally optimized, with clickable links and QR codes

- Bilingual or multilingual, as needed to serve San Mateo’s diverse populations
- Aligned with County branding and ADA accessibility standards

### **JJCPA and YOBG Plans**

**RFP section 2.4.A:** DNA Global will assist San Mateo County Probation in the development of its annual Juvenile Justice Crime Prevention Act (JJCPA) and Youthful Offender Block Grant (YOBG) Plan, a critical document that communicates to the state how County investments are supporting prevention, intervention, and system enhancement efforts for justice-involved youth. Our role will be to provide technical, analytical, and editorial support to ensure that the annual plan:

- Meets Board of State and Community Corrections (BSCC) requirements
- Accurately reflects funded programs, placements, and services
- Demonstrates a cohesive strategy aligned with County priorities and performance indicators
- Includes up-to-date quantitative data, narrative summaries, and success highlights
- Incorporates stakeholder input where appropriate

We will draft clear, concise descriptions of JJCPA- and YOBG-funded programs, including their purpose, target population, service model, performance goals, and outcome trends. Working closely with Probation and CBO partners, DNA Global will ensure that the most recent data on service dosage, demographics, and outcomes are accurately represented and summarized in a format that aligns with BSCC reporting templates. To ensure consistency and strategic alignment, we will integrate relevant content and insights from other County reports, including evaluation findings, Local Action Plan goals, and JJCC priorities. Finally, we will assist with document organization, quality review, and formatting, and provide submission-ready files to ensure the County meets state deadlines with a polished and compliant product. DNA Global’s support will help ensure that the annual JJCPA-YOBG plan is not just a compliance exercise, but a useful planning tool that captures local innovation, identifies progress and gaps, and supports transparent, data-driven juvenile justice funding decisions.

### ***JJRBG Plan***

**Section 2.5.A:** DNA Global will assist San Mateo County in developing its annual JJRBG Plan, ensuring compliance with state requirements while reflecting local priorities for serving high-needs, justice-involved youth. We will support Probation in drafting a clear, data-informed plan that:

- Details programs, placements, and services for realigned youth
- Aligns with BSCC guidelines and the County’s broader juvenile justice strategy
- Incorporates performance measures, equity considerations, and evidence-based practices

In collaboration with Probation, DNA Global will 1) Facilitate public meetings and JJCC presentations as desired, 2) Develop accessible materials and talking points for stakeholders, and 3) Document community input and ensure transparent engagement.

#### **Community Corrections Plan Local Implementation Plan**

**RFP 2.6.A:** DNA Global will support the Adult and Pretrial Services Division through targeted research, data analysis, and policy review, focusing on programs that promote safe, equitable alternatives to incarceration. We will provide analysis and recommendations in the following areas:

- A. Community Corrections Partnership (CCP) Local Implementation Plan
  - Assess progress on CCP plan goals
  - Analyze AB 109–funded services and outcomes
  - Support development of performance dashboards and stakeholder briefs
- B. Pretrial Services
  - Evaluate pretrial screening, supervision, and court appearance rates
  - Analyze outcomes by risk level and demographic subgroup
  - Recommend enhancements to equity, efficiency, and service alignment

Our approach will align with BSCC reporting standards and incorporate both quantitative data and practitioner input. Findings will directly support data-driven decision-making, resource allocation, and compliance with local and state mandates.

### **San Mateo Research and Evaluation Proposal**

We acknowledge the Compliance with laws, Statutes, Ordinances and Executive Orders for San Mateo County.

#### **No Conflict of Interest**

There are no conflicts of interest, financial or otherwise.

#### **PROPOSED SCHEDULE \***

Attach proposed schedule reference ability to complete the project within the County's required time frame

3.5\_Proposed\_Schedule.pdf

3.5\_Proposed\_Schedule.pdf

#### **INNOVATIONS\***

Refence any notable innovations or improvements that you expect to provide (with respect to, for example, efficiency, technology, sustainability)

#### **3.6. Innovations**

DNA Global brings a commitment to innovation, efficiency, and sustainability throughout all aspects of this engagement. For qualitative data analysis, we will incorporate natural language processing (NLP) tools to support thematic coding of interview transcripts, stakeholder feedback, and success stories. This not only accelerates the analytic process but also strengthens the rigor and consistency of findings. To ensure that the County can sustain these practices beyond the life of the contract, all evaluation frameworks, reporting templates, and technical assistance tools will be co-developed with County staff to promote long-term usability and internal capacity-building.

Our deliverables, including annual reports and the five-year Local Action Plan, will be visually engaging, public-facing, and designed for broad accessibility. These reports will include infographics, data visualizations, and narrative storytelling that support informed decision-making across audiences. Through these innovations, DNA Global aims to reduce administrative workload, enhance data

quality, and leave behind tools and systems that strengthen the County’s ability to monitor, improve, and sustain its juvenile and adult justice strategies.

**PERFORMANCE MEASURES\***

Describe a plan for achieving performance measures

**3.7. Performance Measures\***

To ensure accountability, transparency, and continuous improvement, DNA Global proposes the following performance measures aligned to the tasks outlined in the Scope of Work. These measures will serve as benchmarks for tracking progress, maintaining project quality, and ensuring timely delivery of all required products. Each metric reflects our commitment to rigorous standards, responsive collaboration with the County, and effective support for community-based partners. *Final performance targets will be refined in consultation with the County during contract negotiations and evaluation planning*, but the table below outlines our proposed framework for performance monitoring across the five-year engagement.

<b>Table 1. Draft Performance Measures</b>		
<b>Task Area</b>	<b>Performance Measure</b>	<b>Target / Metric</b>
<b>CBO Data Collection &amp; Analysis</b>	Timely data submission from funded CBOs	100% by each reporting cycle deadline
	Initial data quality and completeness	≥ 95% accuracy on first review
	Technical assistance effectiveness	≥ 90% of CBOs report improved data confidence

<b>Annual Reports (JJCPA/JPAF &amp; YOBG/JRFBG)</b>	On-time draft submission to Probation	3+ weeks before November JJCC meeting
	Report quality (clarity, alignment, usefulness)	≥ 90% satisfaction from Probation leadership
	Data presentation and public accessibility	At least 3 visualizations per report
<b>JRFBG &amp; JJCPA-YOBG Plan Support</b>	JRFBG plan submission to the state	100% on-time by May 1 annually
	JJCPA-YOBG narrative and data prepared for County review	≥ 30 days before submission deadline
<b>Local Action Plan (LAP)</b>	Completion of LAP components	100% completed by Q1 of 2030
	Stakeholder engagement breadth	Input gathered from ≥ 6 distinct stakeholder groups
	Stakeholder satisfaction with inclusion in final plan	≥ 85% agree their input was reflected
<b>Technical Assistance &amp; Capacity Building</b>	TA sessions delivered to CBOs	Minimum 2 per CBO annually
	Development of tools/templates to support ongoing evaluation	1+ tool/template delivered annually

<b>Adult &amp; Pretrial Services Evaluation</b>	Completion of evaluation deliverables	All components completed by Q4 of Year 3
	Inclusion of actionable system improvement recommendations	≥ 3 recommendations included in final report

**FIRM QUALIFICATIONS \***

Attach information regarding background and qualifications, including the following:

- A brief description of the proposer.
- A description of not more than three (3) projects similar in size and scope conducted by the proposer, including the client, reference and telephone numbers, primary staff members involved, budget, schedule, and project summary. Descriptions should be limited to one (1) page for each project.
- If subcontractors are anticipated, identify them (if known) and provide information on how they will be used.

3.8\_Firm\_Qualifications\_(DNA).pdf

**TEAM QUALIFICATIONS\***

Provide a chart identifying:

- Project team and reporting structure
- Lead project manager
- Role each person will play in the project

Provide a brief description of the experience and qualifications of the project team members, including short resumes if desired.

Written assurance that the key individuals listed and identified will be performing the work and will not be substituted or reassigned without the County’s prior approval

3.9\_Team\_Qualifications\_(DNA).pdf

REFERENCES\*

Provide 2 references for each of the following, including the name, position/title, address, email, and telephone number of recent clients (preferably other public agencies):

3.10\_References\_(DNA).pdf

FEE PROPOSAL\*

The Fee Proposal should be submitted as a separate PDF file from the Technical Proposals detailed in Required Documents.

The County reserves the right to accept other than the lowest priced offer and to reject any proposals that are not responsive to this request.

County\_of\_San\_Mateo\_Probation\_Research\_&\_Eval\_Services\_RFP\_2025-RFP-00559\_COST\_PROPOSAL\_DNA\_Global.pdf

**Research and Evaluation Services  
Proposal  
San Mateo County  
Probation Department**

RFP Opportunity Number: 2025-RFP-00559

Submitted By DNA Global on August 12, 2025



Yanitxa Albino  
Management Analyst  
San Mateo County Probation Department  
400 County Center, Redwood City, CA 94063

August 12, 2025

**RE: Proposal for Research, Evaluation, and Planning Services (RFP No. 2025-RFP-00559)**

Dear Yanitxa Albino and Evaluation Committee,

On behalf of **Data in Action, LLC (dba DNA Global)**, I am pleased to submit our proposal in response to the San Mateo County Probation Department's Request for Proposal (RFP No. 2025-RFP-00559) for Research, Evaluation, and Planning Services. We welcome the opportunity to partner with the County to deliver high-quality evaluation, rigorous data collection, actionable technical assistance, and strategic planning that strengthen juvenile and adult justice programs.

DNA Global's nationally recognized diverse team brings 28 years of experience leading rigorous, equity-centered, evidence-based evaluations for justice systems across California and the nation. We have extensive expertise in assessing programs funded through JJCPA, CCP, YOBG, JIRBG, diversion alternatives, pretrial and similar initiatives, producing data-driven insights that inform policy, improve service delivery, and advance equitable outcomes for youth, families, and communities. Our highly qualified, community-based multidisciplinary team from National Institutes and top universities brings deep technical, subject matter and pragmatic experience.

We are particularly excited to support San Mateo County Probation in strengthening justice programs, advancing equity, and improving outcomes through evidence-based, data-informed strategies. Our approach is grounded in **Results-Based Accountability and Implementation Science**, ensuring alignment with the County's goals for the 2030–2035 Local Action Plan, annual JIRBG Plan, and JJCPA/YOBG reporting. We center stakeholder collaboration, culturally responsive methods, and data-to-action strategies that drive meaningful, sustainable systems change.


Ms. Leslie Sullivan, our Grants Administrator (lsullivan@datainaction.org, (916) 764-8374) will serve as the primary point of contact and will manage day-to-day communications. I, as President and authorized signatory for DNA Global, affirm that our organization is fully committed and able to meet all deliverables outlined in the RFP. We are confident in offering you more than any of our competition with the proposed terms and conditions. It would be an honor to lead evaluation and related efforts for San Mateo Probation to achieve justice, equity and collective impact for all—a vision we deeply share. Thank you.

Respectfully,  
Dr. Sonia Jain



<b>Applicant's Business</b>	
Name of Business:	Data In Action, LLC (dba: DNA Global)
Business Address:	3736 Fallon Rd., Suite 330, Dublin, California 94568
Telephone Number:	(510) 612-1795
Email Address:	<a href="mailto:sjain@datainaction.org">sjain@datainaction.org</a>
Website Address	<a href="http://www.datainaction.org">http://www.datainaction.org</a>
Federal Tax ID:	45-5499302

<b>Applicant's Primary Contact</b>	
Name:	Leslie Sullivan
Job Title:	DNA Grants Administrator
Address:	3736 Fallon Rd., Suite 330, Dublin, California 94568
Telephone Number:	(916) 764-8374
Email Address:	<a href="mailto:grants@datainaction.org">grants@datainaction.org</a>

<b>Person Authorized to Sign</b>	<b>Signature</b>	<b>Date</b>
Sonia Jain		08/12/2025

## 1.1 Introduction and Executive Summary

### 1.1 MINIMUM QUALIFICATIONS

1.1. Has the Proposer been providing similar services for a minimum of four years within the last seven years? **Yes.**

1.2. Does the program manager have a minimum of two years of experience within the last five years in managing programs of this size? **Yes.**

1.3. Please confirm your firm is registered with System for Award Management (SAM). **Yes, confirmed.**

1.4. What is the registered Business Name and unique Entity ID (UEI) no.?

- Registered Business Name: **Data in Action, LLC**
- Unique Entity ID No.: LPH8JBXAGBX4

### 1.2 PROCUREMENT PREFERENCE FOR LOCAL BUSINESS AND LOCAL NON-PROFITS

2.1. Is the Proposer a “Local Budsiness”? **No.**

2.2 Is the Proposer a Non-Profit? **No.**

SMC\_LocalBusiness\_self-attestation\_form\_120424\_(1).pdf

2.2.1. Is the Proposer a “Local Non-Profit”? **No.**

2.3 Is the Proposer a Local “Small” or “Micro” Business? **No.**

2.4 Is the Proposer a Local “Small” or “Micro” Non-Profit? **No.**

## 3. TECHICAL PROPOSAL

### 3.1 Introduction and Executive Summary

**Data in Action, LLC (dba DNA Global)** **Data In Action, LLC (dba DNA Global)** is a California-based, equity-centered research, evaluation, and development consulting firm with a multidisciplinary team of 11 diverse staff members and partnering experts. We are dedicated to enhancing public safety, advancing justice system reform, promoting gender and racial equity, and building healthy, thriving, and safe communities. Our mission is to help programs, organizations, and systems achieve excellence, advance equity, and maximize impact through actionable, data-driven strategies.

We bring substantial qualifications and decades of experience in both the technical and substantive areas required for this project. Our team has deep understanding, cultural responsiveness, and an unwavering commitment to excellence. We strongly align with San Mateo County’s vision of creating a data-informed culture that ensures accountability, transparency, and high-quality service to the community—building trust, optimizing resource allocation, and strengthening both juvenile and adult justice outcomes.

DNA Global has been an integral partner in transformative justice and behavioral health initiatives across California, working as strategic thought partners with counties, cities, and community-based organizations to achieve operational effectiveness, enhance community engagement, and promote collective impact. We have a demonstrated track record of supporting initiatives through iterative evaluation, performance metrics, and continuous quality improvement—helping clients navigate transitions, anticipate challenges, and capitalize on opportunities to meet shared goals. Over the past 25 years, we have successfully managed similar long-term evaluation and planning efforts, consistently exceeding expectations and delivering measurable results.

Human-centered, strengths-based, and collaborative, we are seasoned evaluators with deep expertise in:

- Criminal justice system reform and evidence-based practices (EBP) implementation
- Gender and racial equity, restorative justice, and resilience frameworks
- Behavioral health, public health, and cross-sector systems integration

Our experience includes long-standing collaborations with probation departments, law enforcement agencies, behavioral health divisions, public health and human services departments, and public safety programs. This cross-sector experience positions us to bring both proven practices and innovative approaches to San Mateo County’s juvenile and adult justice initiatives—ensuring evaluation results are not only rigorous and compliant, but also meaningful, actionable, and sustainable.

DNA was founded in 2012 with the mission to support innovative public programs and systems to achieve equity, excellence, and maximum impact. We have led 80 related complex, several multi-year evaluations nationwide, many with direct relevance to the services outlined in this RFP, including mental health systems of care, pretrial services, CCP, Block grant, NIJ funded, courts, justice, and community health-funded initiatives.

Our core values are rooted in equity, community engagement, and rigorous science. We specialize in:

- Equitable and trauma-informed evaluation
- Mixed-methods measurement and evaluation
- Cross-agency systems collaboration and collective impact
- Culturally and linguistically responsive engagement and data collection
- Translating data into actionable policy, practice, and equitable systems

Our unique strengths include:

- **In-depth understanding and use of overarching guiding frameworks, particularly useful for large systems change evaluations.** These include Results-Based Accountability (RBA), Implementation Science, and Empowerment Evaluation.
- **Stakeholder Co-Design and Feedback Loops:** We convene Evaluation Advisory Groups of community members, service providers, and cross-agency staff to co-design instruments, reflect on findings, and co-develop recommendations. We value community stakeholder feedback and regularly hold stakeholder-specific feedback sessions in the design, results writing, and dissemination stages. Our community-centric approach ensures cultural relevance, comprehensive discussion, and nuanced interpretation.
- **Real-Time Learning:** DNA Global regularly provides quarterly RBA-style briefs, slide decks, and implementation updates to inform mid-course corrections. We also have in-house capacity with Advisor Chris Hwang, Senior Consultant - Data/Technology Expert, to develop an interactive dashboard using Salesforce, coordinating data collection per priority indicators across various sources.
- **Equity & Inclusion Practices:** We apply tools to analyze equity in governance, service access, outcomes, and internal decision-making processes, to ensure that findings and recommendations do not unintentionally perpetuate harm.
- **Culturally and Linguistically Diverse Mixed Methods:** We deeply value and specialize in mixed-methods evaluations that combine statistical, scientific rigor with meaningful narrative, diverse perspectives and stories, anchored in cultural humility and relevance. This includes:
  - **Triangulating data across clinical and administrative** program assessments, intake forms, staff reports, and case notes to ensure the full story, context, factors, and nuances are incorporated and considered.
  - **Conduct multilingual focus groups and interviews,** including translating materials if needed. Co-facilitating focus groups with locally hired and trained field staff (with specific lived experiences) who are culturally and linguistically appropriate (e.g., English, Spanish, Russian). For example, in a mental health system of care evaluation for early childhood in Alameda County, we partnered with local community-based organizations (CBOs) to access and adequately collect data (Community Mental Health Clinic in Chinatown, and 13 other diverse community-based providers), and obtained some of the highest response rates in

the nation, recognized by SAMHSA, USDHHS.

- **Using community-based participatory action research methods** such as photovoice, digital storytelling, and vlogs to uplift lived experiences on a number of projects.
  - This is particularly demonstrated through staff experience as a community epidemiologist with the Alameda County Public Health Department. Dr. Jain, alongside Dr. Nobuko Mizoguchi, conducted numerous community-based participatory action research projects to uplift healthy communities and measure what works, using strength-based assessments and planning.
- **Integrating trauma-informed evaluation practices** in survey design, consent procedures, and data collection and dissemination.
- **Advanced statistical analysis, Quantitative and Qualitative survey design, fidelity to implementation assessments, and data visualization.**

## Executive Summary

DNA Global is pleased to present this proposal to support the San Mateo County Probation Department in advancing its juvenile and adult justice programs through rigorous evaluation, strategic planning, and capacity-building services. Our multidisciplinary team brings over 28 years of experience in equity-centered, culturally responsive research and evaluation across justice, behavioral health, and public health systems.

Over the five-year contract period, DNA Global will provide a comprehensive scope of services designed to meet and exceed state and local requirements, including:

- **Ongoing data collection, analysis, and reporting** for approximately 12 community-based organizations (CBOs) funded through the Juvenile Justice Crime Prevention Act (JJCPA), Juvenile Probation Activities Fund (JPAF), Youthful Offender Block Grant (YOBG), and Juvenile Justice Realignment Block Grant (JJRBG).
- **Development and facilitation of the 2030–2035 Local Action Plan (LAP)** to establish long-term goals, strategies, and measurable outcomes for juvenile justice programs.
- **Annual updates to the JJRBG Plan and JJCPA-YOBG submissions** to ensure timely compliance with state reporting requirements.
- **Technical assistance and performance monitoring** for community partners to improve program fidelity, outcomes, and continuous quality improvement (CQI).
- **Strategic research and evaluation support** for Adult and Pretrial Services and the Community Corrections Partnership (CCP), with a focus on evidence-based practices and system-wide impact.

Our approach emphasizes **efficiency, transparency, and sustainability**. We will leverage advanced technology—including secure cloud-based platforms, real-time performance dashboards, and natural language processing (NLP) tools for qualitative analysis—to streamline data management and enhance analytic rigor. Stakeholder engagement will be central, ensuring that youth, families, community partners, and County staff are actively involved in shaping evaluation priorities and interpreting results.

Through performance measurement frameworks such as **Results-Based Accountability (RBA)** and **Implementation Science**, DNA Global will deliver actionable insights that not only fulfill compliance requirements but also drive continuous system improvement. All deliverables, from quarterly data briefs to the five-year Local Action Plan, will be designed for broad accessibility using compelling data visualizations and clear, concise reporting.

San Mateo County will gain a trusted partner with a proven track record of translating data into actionable strategies, fostering collaboration, and building capacity to sustain meaningful change.

### **3.5. Proposed schedule\***

DNA Global will complete all deliverables within the required timelines, aligned with the County's key reporting and planning cycles. Our project management approach emphasizes clarity, coordination, and consistency across all five years of the engagement. DNA Global will manage all deliverables using shared project timelines, milestone tracking tools, and quarterly check-ins with County leadership, ensuring each element is delivered on time and with precision. Our structure is designed to reduce administrative burden while maximizing quality, transparency, and alignment with San Mateo County's juvenile and adult justice goals.

#### **Annual Deliverables (Years 1–5)**

- **CBO Data Collection & Analysis**  
Ongoing data gathering from ~12 funded CBOs to track program dosage, demographics, and outcomes (January–October annually)
- **Technical Assistance to CBOs**  
Support for high-quality data collection and implementation of evidence-based assessment tools
- **Survey Development**  
Design and deployment of supplemental instruments in coordination with Probation as needed
- **JJCPA & JPAF Annual Report**  
Developed July–October; presented at the November JJCC meeting
- **YOBG & JJRBG Annual Report**  
Parallel report development and presentation at the November JJCC meeting
- **JJRBG Plan (SB 823 Compliance)**  
Updated annually between January and April; submitted by May 1 to the state
- **JJCPA-YOBG Plan Support**  
Developed in alignment with BSCC requirements each spring
- **Resource Guide for Youth & Families**  
Updated and published annually, July–October
- **Stakeholder Briefings and JJCC Presentations**  
Prepared for each November JJCC meeting with presentation-ready visuals and summaries

#### **Strategic Deliverables**

- **2030–2035 Local Action Plan (LAP)**  
Developed over the first four years with delivery in late 2029. Work includes:
  - Stakeholder engagement
  - Resource mapping
  - Strategy design
  - Final plan packaging for public and system use



- **Adult & Pretrial Services Research (Years 1–3)**  
Analysis of the CCP Implementation Plan and pretrial services programming, including:
  - Data analysis
  - Policy review
  - Final summary reports by end of Year 3
- **Youth & Family Services Evaluation (Years 1–3)**  
Cross-sector landscape assessment of existing supports in education, mental health, social services, law enforcement, and more



### **3.5. Proposed schedule \***

DNA Global will complete all deliverables within the required timelines, aligned with the County’s key reporting and planning cycles. Our project management approach emphasizes clarity, coordination, and consistency across all five years of the engagement. We will manage all deliverables using shared project timelines, milestone tracking tools, and quarterly check-ins with County leadership, ensuring each element is delivered on time and with precision. Our structure is designed to reduce administrative burden while maximizing quality, transparency, and alignment with San Mateo County’s juvenile and adult justice goals.

The Table below provides tentative timeline to achieve key evaluation tasks, including milestones and deliverables in year one. DNA will initiate an in-person kick-off planning meeting with key City staff to clarify project goals, deliverables, communication structure; to understand City needs, concerns, and expectations; and to obtain any relevant program documents (plans, evaluations reports, notes, ideas, guidebooks). We will need to sign MOUs with CBOs or government agencies to obtain access to relevant data shortly after. All data requested shall be encrypted and password protected, shared using high-security anti-virus software and secure filing capabilities. The evaluation plan would be a living breathing document, and we would incorporate constructive feedback, abide by the highest ethical, HIPAA, data integrity and research best practices.

Respective roles and responsibilities of the **County** and DNA staff must be achieved in a timely manner for successful completion of the project. The primary responsibilities of the city staff would be to: 1) Facilitate timely access to necessary documents, data, key stakeholders and committees, 2) Provide timely, constructive reviews and feedback, and 3) Strategize what works for data collection etc. (e.g., with specific units, staffing, tools and reports) to ensure user-friendly and meaningful process, and 4) Share insights on local Lancaster context and system. DNA will oversee and manage all aspects of the evaluation including design, tools, reports, and presentations. Mutual respect, understanding, and shared accountability are key.

#### **Annual Deliverables (Years 1–5)**

- CBO Data Collection & Analysis - Ongoing data gathering from 12 funded CBOs to track program dosage, demographics, and outcomes (January–October annually)
- Technical Assistance to CBOs - Support for high-quality data collection and implementation of evidence-based assessment tools
- Survey Development - Design and deployment of supplemental instruments in coordination with Probation as needed
- JJCPA & JPAF Annual Report - Developed July–October; presented at the November JJCC meeting
- YOBG & JRBG Annual Report - Parallel report development and presentation at the November JJCC meeting



- JJRBG Plan (SB 823 Compliance) - Updated annually between January and April; submitted by May 1 to the state
- JJCPA-YOBYG Plan Support - Developed in alignment with BSCC requirements each spring
- Resource Guide for Youth & Families - Updated and published annually, July–October
- Stakeholder Briefings and JJCC Presentations - Prepared for each November JJCC meeting with presentation-ready visuals and summaries

**Strategic Deliverables**

- **2030–2035 Local Action Plan (LAP)** - Developed over the first four years with delivery in late 2029. Work includes:
  - Stakeholder engagement
  - Resource mapping
  - Strategy design
  - Final plan packaging for public and system use
- **Adult & Pretrial Services Research (Years 1–3)** - Analysis of the CCP Implementation Plan and pretrial services programming, including:
  - Data analysis
  - Policy review
  - Final summary reports by end of Year 3
- **Youth & Family Services Evaluation (Years 1–3)** -- Cross-sector landscape assessment of existing supports in education, mental health, social services, law enforcement, and more.

**Table 1. Tentative Timeline and Tasks**

Key Tasks	Timeline	Roles and Responsibilities	
		County Staff	DNA
<b>PHASE A: RBA &amp; PROGRAM OUTCOMES PRIORITIZE.</b>			
<b>Introductions and onboarding:</b> <ul style="list-style-type: none"> <li>● In-person kick-off mtg to clarify project goals, expectations, data, communication structure, and deliverables.</li> <li>● Review key documents.</li> <li>● Establish Advisory Committee.</li> </ul>	2-3 weeks	-Provide all documents. -Clarify expectations, communication structure. -Organize kick-off meeting. -Establish diverse evaluation advisory committee. -Introduce DNA and ensure Department-wide	-Review all materials. -Co-facilitate questions for the meeting (needs, expectations, documents, plans, data). -Data privacy, MOUs sign.

		communication re: eval updates.	
<b>PHASE B: EVALUATION PLANNING AND TOOLS DEVELOPMENT.</b>			
<b>Develop Evaluation Plan</b> <ul style="list-style-type: none"> <li>Review local and national evidence base, tools</li> </ul>	1 month	-Share evaluation questions, interests, needs. -Provide feedback.	Develop draft and final evaluation plan.
<b>Data Collection Tools Development</b> <ul style="list-style-type: none"> <li>Performance metrics dashboard</li> <li>Systemwide partner survey</li> <li>Key Stakeholder Interview Questionnaire.</li> <li>Focus group questions.</li> <li>EBP fidelity checklist form.</li> </ul>	1 month	-Share prior tools, or desired tools from other jurisdictions. -Review and provide feedback. -Help with pilot tools. -Strategize sampling (e.g., focus groups, interviews, org survey)	Develop proposed data collection tools, mixed methods, sampling. Obtain feedback from advisory, pilot administration, and finalize.
<b>Data Collection and Management</b> <ul style="list-style-type: none"> <li>Dashboard training</li> <li>Partner survey administer.</li> <li>Phone interviews (12)</li> <li>Focus groups (3) – leadership, staff/POs, probationers.</li> <li>Fidelity to EBP Data collection</li> </ul>	3 months	Dashboard trainings setup Partner survey sends out systemwide. Set up focus groups (more effective than external evaluator) Provide interviewees with info.	Dashboard share and offer online trainings. Partner survey reminders. Conduct interviews, focus groups, documents review.
<b>PHASE C: EVALUATION AND DATA-DRIVEN DECISION-MAKING.</b>			
Secondary data obtain and analysis	2-3 months	-Provide access to existing datasets (program, system, service, staff performance, admin data)	Obtain, clean, and analyze existing data (funding dependent)
Data Analysis, interpretation, and synthesis	2 months	-Interpretation and discussion in Eval Advisory Committee	Clean and analyze qualitative and quantitative primary data collected. Synthesize, graphing and data visualization

Progress Reports	Monthly	-Share with key stakeholders and funder.	Prepare 2–3-page monthly progress reports (per RBA format)
Final Evaluation Report (with key Results and Recommendations)	1 month	-Co-develop recommendations -Provide constructive feedback -Share broadly.	Prepare final report with recommendations, obtain feedback, discuss and share presentation to inform improvements and optimization)

*\*Note this is a general timeline we would use for evaluation and planning efforts, but these will be specified for particular projects based on SOW.*

### 4.2.3. Project Approach

Several of the priority areas for San Mateo Probation are of great interest and expertise of DNA, that we would build off of your past assessment and evaluation efforts, to refine and strengthen in terms of advancing local and national evidence-base to create the most efficient, innovative and effective system, practices, programming and impact.

*The following sections highlight how we will perform the specific scope of work tasks stated in Page 4, Section 2 of RFP.*

#### Section 2.1.A. Program Evaluation and Reporting

##### Evaluation Design and Guiding Frameworks:

Our evaluation approach is designed to meet all requirements for JJCPA, YOBG, JPAF, and JJRBG-funded program evaluations while advancing San Mateo County’s broader goals for the 2030–2035 Local Action Plan (LAP) and annual JJRBG Plan. The design integrates rigorous performance measurement with equity-centered, evidence-informed analysis to assess program effectiveness, identify strengths and gaps, and inform strategic priorities. By combining compliance reporting with practical, system-level insights, DNA Global will equip the County, the JJCC, and funded CBOs with actionable data to strengthen cross-agency capacity, improve service delivery, and achieve sustainable, measurable improvements in outcomes for youth, families, and communities.

Grounded in diversity, equity and inclusion (DEI), DNA Global would use Empowerment Evaluation (EE), Implementation Science<sup>1</sup>, and Results based Accountability (RBA)<sup>2</sup> Getting to Outcomes frameworks to develop, measure and improve multidimensional priority performance measures, and support City of Lancaster’s justice and related systems reform. We strongly believe that “*Not all that counts can be measured, and not all that is measured should be counted,*” thus, it is crucial to prioritize and use overarching frameworks and principles to guide evaluation.

- Empowerment Evaluation (EE) operationalizes growth mindset by sustaining focus on strengths, staff capacities and what is working well, a unique strength of ours to focus on supporting systems to identify and build upon what works at system, program, service, staff, and client levels. It is a much more powerful and effective strategy than identifying gaps and focusing on deficits.
- RBA would guide development of evaluation questions and a simple logic model (1-page) linking strategic plan to evaluation, which starts with the ends in mind (results/goals) and works backwards to identify strategies and activities that support implementation. We will replicate this and create a unified cohesive logic model for each of the initiatives or programs that we will work with. RBA helps challenge underlying assumptions which can

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<sup>1</sup> Leveraging knowledge from national experts (such as Ed Latessa and Faye Taxman) and supported by the U.S. Department of Justice and Bureau of Justice Assistance.

<sup>2</sup> <https://blog.upmetrics.com/results-based-accountability/>

be barriers to innovation, encourages system-wide cooperation, and uses intermediate outcomes, which are more commonplace and powerful to track and achieve in systems change initiatives.

- Implementation Science will help better understand why things are happening, providing specific insights on internal organizational factors, and external partner perspective. We would leverage existing local and national data, tools and lessons learned, addressing gaps in past evaluations to align with new department goals and objectives.

Process evaluation of a highly evolving systems change can be messy, thus it may be beneficial to group the evaluation into *special studies* for ease of understanding and use, such as: Descriptive study, Fidelity to EBP implementation study, System-level Assessment, and Longitudinal Recidivism Outcome Study -- including disparities by race and gender. In year 2, we would also prioritize Outcome Evaluation, expanding the years of process and formative evaluations conducted in San Mateo County, leveraging our in-depth knowledge of literature, research, instruments/tools, and systems level outcomes. We propose a rigorous Outcome study, *Quasi-Experimental, Pre-Post Comparison Group evaluation design* is proposed, comparing key outcomes of offenders on probation supervised by POs trained in EBP vs. not, and those with high vs. low EBP fidelity.

### **Evaluation Questions:**

The evaluation will aim to answer the following primary questions per RBA framework:

- 1) What are you doing?
  - a. Descriptive analysis of activities (numbers of clients served, staff trained)
- 2) How well are you doing it? (fidelity, quality, satisfaction, response time)
  - a. How closely does the implementation follows original design? (At system, organizational, program or practice levels)
  - b. What factors are facilitating or hindering successful implementation of EBP, and ways to increase fidelity?
  - c. Where to focus efforts to improve equity in programs or policy? (Examining underlying systems of inequity – decision-making, power dynamics, collaboration, communication, policies - that affect those served differently based on race.)
- 3) What difference are you making? (Outcome evaluation)
  - a. How effective are program activities in achieving intended outcomes?
  - b. How well are trainings improving PO's and units' capacity (knowledge, attitudes, skills, practices)? (pre-post survey, fidelity checklist)
  - c. How effective are *specific EBP* in improving offenders' outcomes? (Offender outcome data for those supervised by high vs. low fidelity officers)

This evaluation design not only fulfills all requirements outlined for JJCPA, YOBG, JPAF, and JIRBG-funded program evaluations, but also supports San Mateo County's broader vision for the 2030–2035 Local Action Plan and annual Juvenile Justice Realignment Block Grant Plan. Our approach integrates rigorous performance measurement with equity-centered, evidence-informed analysis to assess program effectiveness, identify strengths and gaps, and inform strategic

priorities. By combining compliance reporting with practical, system-level insights, DNA Global will equip the County, the JJCC, and funded CBOs with the data needed to strengthen cross-agency capacity, improve service delivery, and achieve sustainable, measurable improvements in outcomes for youth, families, and communities.

Under the guidance of the San Mateo County Probation Department, DNA Global will conduct a comprehensive, equity-informed assessment of the effectiveness of juvenile programs operated by or under contract with the department (for example, contracted community-based organizations (CBOs)). This work will build upon our successful evaluation frameworks used in Sonoma and Alameda Counties, where we assessed program fidelity, participant outcomes, and system alignment across multiple juvenile justice service providers.

Our approach to assessing **program effectiveness** will include:

- Clarifying program goals and logic models through document review, interviews, and CBO consultations
- Aligning outcome measures with those established by the Probation Department, JJCC, and BSCC funding streams
- Tracking progress against defined outputs and outcomes, including changes in client behavior, engagement levels, recidivism-related indicators, and skill development
- Conducting site visits, staff interviews, and focus groups with CBO staff and youth participants to capture implementation fidelity, barriers to success, and contextual factors affecting program delivery
- Incorporating client voice into the evaluation by collecting participant feedback and success stories, particularly from youth populations historically marginalized in justice systems

Effectiveness will be assessed both quantitatively (e.g., dosage, completion rates, and outcomes) and qualitatively (e.g., youth engagement, staff observations, and perceived impact), with attention to equity and access across race, gender, and geography. Findings will be synthesized in program-level summaries and integrated into the broader annual reports, allowing for comparisons, identification of promising practices, and actionable recommendations for continuous improvement. By grounding the evaluation in local context and data-use readiness, DNA Global will ensure that the assessment of program effectiveness informs both contract monitoring and strategic investment in juvenile justice services.

**Section 2.1.B. Quantitative and Qualitative Data Collection Methods** -- Data collection will be directly aligned with San Mateo County's goals and objectives for juvenile and adult probation services, the LAP, and the JJRBG Plan. Our mixed-methods approach will integrate both quantitative and qualitative measures to produce a comprehensive picture of program performance, client outcomes, and system-level impact. Dr. Macdonald and evaluation manager will oversee the process evaluation in a systematic, proactive way - anticipating challenges, responding to evolving needs, contextually and culturally relevant approaches and solutions. The evaluation questions will

be answered using mixed methods, both quantitative and qualitative, to assess program performance, client outcomes and system impact- leveraging existing local and national data and tools. We will integrate multiple data sources for a comprehensive view of impact, leveraging existing County data systems where possible. Quantitative methods would include service delivery metrics, referral logs, program service dosage, recidivism files and others. Qualitative data would include client/staff interviews, focus groups or site observations, as well as document reviews and case studies. Primary data collection would include fidelity checklists, standardized tracking forms, and surveys with clients, youth, staff, and partners.

Specifically, DNA Global will lead a structured and collaborative process to collect and analyze quantitative and qualitative data from CBOs funded through JJCPA, JPAF, YOBG, JJRBG, and other relevant sources. In collaboration with Probation and CBO partners, we will collect and analyze the following categories of data:

1. Program Dosage: We will gather detailed service data including number of sessions, hours per participant, duration of engagement, and completion rates. When applicable, we will align this with risk levels or presenting needs to understand dosage-effectiveness relationships.
2. Demographics of Clients Served: CBOs will report on core demographic variables, race/ethnicity, age, gender identity, zip code, primary language, and referral source. We will disaggregate outcomes across these variables to support equity-focused analysis.
3. Relevant Outcomes Based on Established Performance Measures: We will work with Probation to align each CBO's outcomes with established program-specific and County-wide performance indicators. These may include:
  - Reductions in justice system involvement
  - School attendance or engagement metrics
  - Behavioral improvements or goal achievement
  - Client satisfaction or readiness indicators
4. Program Strengths and Challenges: Using structured interviews, fidelity tools, and staff surveys, we will assess implementation quality, organizational capacity, and contextual barriers. This supports both continuous improvement and investment planning.
5. Client Success Stories: We will collect narrative data via client interviews, testimonials, and brief written prompts, highlighting individual transformation, resilience, and community impact. These stories will be included in the public-facing reports to ensure the human experience is centered alongside performance metrics.

Our evaluation team will use secure and standardized templates to ensure consistent data collection across CBOs while remaining flexible to each organization's capacity and data systems. We will provide TA as needed to improve data quality and completeness, while building trust and transparency with provider partners. Further, all collected data will be synthesized into analytic



August 12, 2025

County of San Mateo  
Probation Department

Dr. Sonia Jain  
Founder & Principal  
Data in Action, LLC (dba: DNA Global)  
sjain@datainaction.org

**Subject: Proposal Submission – San Mateo County Probation Department – Research, Evaluation, and Planning Services (RFP No. 2025-RFP-00559) – COST PROPOSAL**

Dear Sir/Madame,

DNA Global is pleased to submit this Cost Proposal in response to San Mateo County Probation Department’s Request for Proposal No. 2025-RFP-00559 for Research, Evaluation, and Planning Services. This cost proposal accompanies our technical proposal. The proposed budget is based on a Time and Materials (T&M) structure and reflects a lean, competitive rate structure that maximizes efficiency while ensuring high-quality deliverables. All personnel rates have been reduced from standard levels to align with County budget considerations, and hours have been strategically allocated with modest reductions in later years to emphasize efficiency gains over time. Overhead and indirect costs have been limited to 15%, with efficiencies gained through technology-enabled data collection, natural language processing (NLP) tools for qualitative analysis, and streamlined reporting processes.

We appreciate the opportunity to present a competitive, time-and-materials-based cost structure designed to deliver exceptional value, build local capacity, and produce actionable results aligned with the County’s priorities and performance measures.

Respectfully,

Respectfully,

A handwritten signature in black ink, appearing to read "S. Jain", is positioned below the second "Respectfully,".

Dr. Sonia Jain  
DNA Global, Founder & Principal



**San Mateo County Probation Department  
Research, Evaluation and Planning Services  
RFP No. 2025-RFP-00559  
COST PROPOSAL**

Legal Name of Firm: Data in Action, LLC (DBA: DNA Global)  
Contact Name(s): Sonia Jain, DrPH, Founder & Principal; [sjain@datainaction.org](mailto:sjain@datainaction.org)  
Sallie Yoshida, DrPH, Sr. Business Development Consultant;  
[grants@datainaction.org](mailto:grants@datainaction.org)  
Telephone Number: (510) 612-1795  
For Correspondence: 3736 Fallon Rd., Suite 330, Dublin, CA 94568  
Federal Tax ID Number: 45-5499302

**DNA Proposed Budget\* - San Mateo County Adult Services CCP LAP activities and Assessment of Resources**

Budget Category	Description	Unit	Qty	Rate	Year 1	Year 2	Year 3	Year 4	Year 5
<b>Personnel</b>					<b>\$ 108,000</b>	<b>\$ 111,240</b>	<b>\$ 114,577</b>	<b>\$ 118,015</b>	<b>\$ 121,555</b>
Principal Evaluator (Dr. Jain)	Oversight, design, stakeholder engagement, QA/Reporting	Hour	200	220	\$ 44,000	\$ 45,320	\$ 46,680	\$ 48,080	\$ 49,522
Senior Researcher (Dr. MacDonald)	Lead methodology, fidelity assessment, CCP Ev	Hour	200	100	\$ 20,000	\$ 20,600	\$ 21,218	\$ 21,855	\$ 22,510
Research Assistant (TBD)	Qualitative data collection, qual analysis, report	Hour	130	60	\$ 7,800	\$ 8,034	\$ 8,275	\$ 8,523	\$ 8,779
Evaluation Manager (Peeper)	Project coordination, data collection oversight,	Hour	120	60	\$ 7,200	\$ 7,416	\$ 7,638	\$ 7,868	\$ 8,104
Data Scientist / Analyst (Hwang)	Dashboard development, statistical analysis, data integratic	Hour	100	140	\$ 14,000	\$ 14,420	\$ 14,853	\$ 15,298	\$ 15,757
Community Engagement Lead/Field Staff (TBH)	Stakeholder interviews, focus groups, CBO TA	Hour	50	60	\$ 3,000	\$ 3,090	\$ 3,183	\$ 3,278	\$ 3,377
Sr. Advisors/Subject Matter experts (Dr. Petrosino, Williams)		Hour	40	300	\$ 12,000	\$ 12,360	\$ 12,731	\$ 13,113	\$ 13,506
Fringe Benefits					\$ -	\$ -	\$ -	\$ -	\$ -
<b>Travel</b>					<b>\$ 3,900</b>	<b>\$ 4,017</b>	<b>\$ 4,138</b>	<b>\$ 4,262</b>	<b>\$ 4,389</b>
Local travel	Site visits, JJCC meetings, CBO meetings (mile Trip		10	100	\$ 1,000	\$ 1,030	\$ 1,061	\$ 1,093	\$ 1,126
In-county overnight travel	As needed for multi-day stakeholder sessions	Trip	3	300	\$ 900	\$ 927	\$ 955	\$ 983	\$ 1,013
Airfare + lodging (if needed)	Out-of-area staff support for presentations/train	Trip	2	1000	\$ 2,000	\$ 2,060	\$ 2,122	\$ 2,185	\$ 2,251
<b>Supplies &amp; Materials</b>					<b>\$ 750</b>	<b>\$ 773</b>	<b>\$ 796</b>	<b>\$ 820</b>	<b>\$ 844</b>
Data collection materials	Printing, surveys, transcription, incentives				\$ 750	\$ 773	\$ 796	\$ 820	\$ 844
<b>Technology &amp; Software</b>					<b>\$ 1,950</b>	<b>\$ 2,009</b>	<b>\$ 2,069</b>	<b>\$ 2,131</b>	<b>\$ 2,195</b>
Data analysis software (SPSS, NVivo, Tableau)	Annual licenses for project team				\$ 900	\$ 927	\$ 955	\$ 983	\$ 1,013
Secure data platform / dashboard	Cloud hosting, maintenance				\$ 1,050	\$ 1,082	\$ 1,114	\$ 1,147	\$ 1,182
<b>Other Direct Costs</b>					<b>\$ 1,800</b>	<b>\$ 1,854</b>	<b>\$ 1,910</b>	<b>\$ 1,967</b>	<b>\$ 2,026</b>
Stakeholder engagement facilitation	Venue, refreshments, interpretation				\$ 900	\$ 927	\$ 955	\$ 983	\$ 1,013
Language access services	Translation & interpretation as needed				\$ 900	\$ 927	\$ 955	\$ 983	\$ 1,013
<b>Total costs</b>					<b>\$ 116,400</b>	<b>\$ 119,892</b>	<b>\$ 123,489</b>	<b>\$ 127,193</b>	<b>\$ 131,009</b>
<b>Indirect Costs</b>	<b>15% of direct costs</b>				<b>\$ 17,460</b>	<b>\$ 17,984</b>	<b>\$ 18,523</b>	<b>\$ 19,079</b>	<b>\$ 19,651</b>
<b>Total Proposed Budget</b>					<b>\$ 133,860</b>	<b>\$ 137,876</b>	<b>\$ 142,012</b>	<b>\$ 146,272</b>	<b>\$ 150,661</b>

\*Note, the actual budget per year may change based on exact scope of work and deliverables expected, and staffing required.

**DNA Proposed Budget\* - Juvenile Services, San Mateo County Probation**

Budget Category	Description	Qty	Rate	Year 1	Year 2	Year 3	Year 4	Year 5
<b>Personnel</b>				<b>\$108,000</b>	<b>\$ 111,240</b>	<b>\$ 114,577</b>	<b>\$ 118,015</b>	<b>\$ 121,555</b>
Principal Evaluator (Dr. Jain)	Oversight, design, stakeholder engagement, QA, r	200	220	\$ 44,000	\$ 45,320	\$ 44,000	\$ 44,000	\$ 44,000
Senior Researcher (Dr. MacDonald)	Lead methodology, fidelity assessment, LAP/JJRE	200	100	\$ 20,000	\$ 20,600	\$ 21,218	\$ 21,855	\$ 22,510
Research Assistant/Qualitative Analyst (TB	qualitative data collection, analysis, reports	130	60	\$ 7,800	\$ 8,034	\$ 8,275	\$ 8,523	\$ 8,779
Evaluation Manager	Project coordination, data collection oversight, qu	120	60	\$ 7,200	\$ 7,416	\$ 7,638	\$ 7,868	\$ 8,104
Data Scientist / Analyst (Hwang)	Dashboard development, statistical analysis, data i	100	140	\$ 14,000	\$ 14,420	\$ 14,853	\$ 15,298	\$ 15,757
Community Engagement Lead/Field Staff	Stakeholder interviews, focus groups, CBO TA	50	60	\$ 3,000	\$ 3,090	\$ 3,183	\$ 3,278	\$ 3,377
Sr. Advisors/Subject Matter experts (Dr. Petrosino, Williams)		40	300	\$ 12,000	\$ 12,360	\$ 12,731	\$ 13,113	\$ 13,506
Fringe Benefits		0		\$ -	\$ -	\$ -	\$ -	\$ -
<b>Travel</b>				<b>\$ 3,600</b>	<b>\$ 3,708</b>	<b>\$ 3,819</b>	<b>\$ 3,934</b>	<b>\$ 4,052</b>
Local travel	Site visits, JJCC meetings, CBO meetings (mileag	10	100	\$ 1,000	\$ 1,030	\$ 1,061	\$ 1,093	\$ 1,126
In-county overnight travel	As needed for multi-day stakeholder sessions	2	300	\$ 600	\$ 618	\$ 637	\$ 656	\$ 675
Airfare + lodging (if needed)	Out-of-area staff support for presentations/trainin	2	1000	\$ 2,000	\$ 2,060	\$ 2,122	\$ 2,185	\$ 2,251
<b>Supplies &amp; Materials</b>				<b>\$ 1,750</b>	<b>\$ 1,803</b>	<b>\$ 1,857</b>	<b>\$ 1,912</b>	<b>\$ 1,970</b>
Data collection materials & incentives	Printing, surveys, transcription, participant incentives			\$ 1,750	\$ 1,803	\$ 1,857	\$ 1,912	\$ 1,970
<b>Technology &amp; Software</b>				<b>\$ 3,950</b>	<b>\$ 4,069</b>	<b>\$ 4,191</b>	<b>\$ 4,316</b>	<b>\$ 4,446</b>
Data analysis software (SPSS, NVivo, Tabl	Annual licenses for project team			\$ 1,500	\$ 1,545	\$ 1,591	\$ 1,639	\$ 1,688
Secure data platform / dashboard	Cloud hosting, maintenance			\$ 2,450	\$ 2,524	\$ 2,599	\$ 2,677	\$ 2,757
<b>Other Direct Costs</b>				<b>\$ 4,200</b>	<b>\$ 4,326</b>	<b>\$ 4,456</b>	<b>\$ 4,589</b>	<b>\$ 4,727</b>
Stakeholder engagement facilitation	Venue, refreshments, interpretation			\$ 1,200	\$ 1,236	\$ 1,273	\$ 1,311	\$ 1,351
Language access services	Translation & interpretation for Spanish			\$ 500	\$ 515	\$ 530	\$ 546	\$ 563
<b>Total Costs</b>				<b>\$121,500</b>	<b>\$ 125,145</b>	<b>\$ 128,899</b>	<b>\$ 132,766</b>	<b>\$ 136,749</b>
<b>Indirect Costs/Overhead</b>	<b>15% of total costs</b>			<b>\$ 18,225</b>	<b>\$ 18,772</b>	<b>\$ 19,335</b>	<b>\$ 19,915</b>	<b>\$ 20,512</b>
<b>Total Proposed Budget</b>				<b>\$ 139,725</b>	<b>\$ 143,917</b>	<b>\$ 148,234</b>	<b>\$ 152,681</b>	<b>\$ 157,262</b>

\*Note, the actual budget per year may change based on exact scope of work and deliverables expected, and staffing required.



## **Budget Justification**

### **Salaries (Contractual) and Benefits**

All DNA staff are subcontractors without benefits. This allows us to provide our clients with highly qualified research and evaluation staff at a cost-effective rate. Our staff are nationally recognized in their respective fields and provide rigorous yet meaningful evaluation studies on par with university and research institute levels. Salaries are based on the actual hours worked by each staff. The salary rates used in this proposal are current and have been adjusted to account for probable cost-of-living adjustments within the proposal dates. Additionally, a 19.5% allowance has been included for earned leave. DNA's minimum working days for one full-time employee (FTE) is 222 per year.

### **Consultants/Other Personnel**

Dr. Jain and Dr. Macdonald will serve as the primary lead evaluators/ senior researcher to lead the Juvenile and Adult evaluation design and implementation, tools development, data management, data analysis, and reporting working closely with San Mateo County Probation and partners. We also have additional distinguished Senior Consultants (Williams, Hwang, and Petrosino) with extensive subject matter, practical, and methodological expertise in specific areas such as juvenile justice system, mental health, racial/ethnic equity, public health, resilience, quantitative methods/randomized trials/rigorous evaluation designs, multi-level longitudinal statistical analytic procedures. They will advise on various aspects of the evaluation design, review and validation of data collection tools and instruments, logic model/theory of change development, facilitation, data analysis and advanced methods, sampling, and preparation of reports and manuscripts.

### **Travel**

We are budgeting for mostly in-person trips for 2 Research Staff (Dr. Jain and Research staff) to/from Oakland, CA, and local trips for field staff for the evaluation team/collaborators for in-person meetings. Otherwise, virtual meetings (e.g., via zoom) will be conducted as needed throughout the evaluation. We are also budgeting at least 2 trips per juvenile and adult each (may not need all 4), for Dr. Macdonald to fly in from Virginia towards beginning, middle and end of each year.

All travel expenses are based on the firm's policy. We are including several trips to onsite meetings for DNA staff. Data collection focus groups will also require at least 3 trips. Airfare estimates are based on current average round-trip coach fares provided by the organization's travel agencies. Lodging is based on average rates for various cities. Per diem is charged at \$45/day or \$11.25/quarter day. For local travel, per diem is as follows: breakfast, \$9.00; lunch, \$12.00; dinner, \$24.00. For each trip, other expenses include ground transportation (such as



shuttles, taxis, or trains), parking, tolls, and incidentals. Mileage reimbursement is charged at the current GSA's approved reimbursement rate.

### **Other Direct Costs**

**Postage/Telephone\***—include general mailing and telecommunication costs.

**Printing/Graphics\***—includes general office copying.

**Outside Services**—includes meeting expenses such as room rentals for workshops and conferences; equipment; flip charts, supplies, catering, and other related costs in hosting offsite events. None for this project is required.

**Educational Fees**—includes registration fees for relevant memberships, training, and one conference.

**Supplies and Materials\***—includes general office items such as stationery, pens, writing tablets, markers, clips, notepads, and other similar materials.

**Information Systems (IT)**—IT comprises several distinct functions or services that directly support projects. It includes:

- **Personal Computers**—This represents the depreciation charges for computing software and hardware for project staff. This includes PCs, monitors, printers, cables, and software packages. The depreciation cost of this equipment is assigned to individual staff and is allocated directly to the project they are working on, based on hours reported.
- **IT Support\***This category consists of costs related to providing general technical support to staff on issues related to networks, data recovery, software applications, MAC and PC hardware problems, and database support.
- **Common Network\*** It includes common equipment such as servers, and routers, as well as the maintenance of equipment. In addition, it includes the cost of common operating software as well as software for databases, required to provide DNA Global with a data network system.
- **Shared Equipment\***for printers, toner cartridges, LCD projectors, video conference equipment, faxes, servers, and routers at each site.

### **Facility\***

Facility represents the rent and/or occupancy of project office space for DNA for key staff as appropriate. We use shared office space WeWork and home-based remote offices globally.



### **Program Support\***

Program support includes administrative and program services. Administrative services represent expenses such as human resources, purchasing, business insurance, legal, membership dues, and general administration. Program services consist of activities involving staff planning, quality review, staff professional development, project planning, and staff evaluation.

### **Indirect Costs**

The inclusion of indirect costs on contracts awarded to organizations like DNA Global has been a widespread practice by federal agencies for many years. The government recognizes that the cost principles under which contractors can claim reimbursement of costs incurred on a project do not allow recovery of all necessary and pertinent costs of doing business. For the contractor to remain viable, a fee must be received, as is evidenced by numerous studies supporting this finding. We charge a minimum (15%) for overhead, given most of our staff work remotely while providing the highest caliber of research services.

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\*General expenses in these categories are pooled and allocated to projects based on labor hours charged. DNA Global uses a target allocation rate based on the previous year's actual rate for charging projects as well as for budgeting purposes. This rate may be adjusted during the year to reflect actual performance.



County of San Mateo

## Probation

John T. Keene, Chief Probation Officer

400 County Center, Redwood City, CA 94063

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### [RDA CONSULTING, SPC] RESPONSE DOCUMENT REPORT

RFP No. 2025-RFP-00559

Research and Evaluation Services

RESPONSE DEADLINE: August 12, 2025 at 5:00 pm

Report Generated: Wednesday, August 13, 2025

### RDA Consulting, SPC Response

#### CONTACT INFORMATION

**Company:**

RDA Consulting, SPC

**Email:**

bizdevopps@rdaconsulting.com

**Contact:**

Amalia Egri Freedman

**Address:**

330 Franklin Street, Suite 400  
Oakland, CA 94607

**Phone:**

(510) 488-4345

**Website:**

<https://www.rdaconsulting.com>

**Submission Date:**

Aug 11, 2025 8:47 PM (Pacific Time)

## ADDENDA CONFIRMATION

Addendum #1

*Confirmed Jul 23, 2025 3:04 AM by Amalia Egri Freedman*

## QUESTIONNAIRE

### 1. Minimum Qualifications

HAS THE PROPOSER BEEN PROVIDING SIMILAR SERVICES FOR A MINIMUM OF FOUR (4) YEARS WITHIN THE LAST SEVEN (7) YEARS?\*

Yes

DOES THE PROGRAM MANAGER HAVE A MINIMUM OF TWO (2) YEARS OF EXPERIENCE WITHIN THE LAST FIVE (5) YEARS IN MANAGING PROGRAMS OF THIS SIZE?\*

Yes

PLEASE CONFIRM YOUR FIRM IS REGISTERED WITH SYSTEM FOR AWARD MANAGEMENT (SAM)\*

[SAM.gov](https://sam.gov)

Confirmed

WHAT IS THE REGISTERED BUSINESS NAME AND UNIQUE ENTITY ID (UEI) NO.?\*

- UEI number can be obtained by registering your business through SAM.GOV
- Should you be in the process of obtaining your UEI number, please enter the digits '123' temporarily for your response below in order to proceed with proposal. This temporary number should be replaced with the correct registration number for submission of the proposal.

K2XLRNDATD79

## 2. Procurement Preference for Local Businesses and Local Non-Profits

IS THE PROPOSER A "LOCAL BUSINESS"?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code, a "Local Business" means any for-profit business which has its principal place of business, or is headquartered, in San Mateo County. If this designation applies to the proposer, a self-attestation form must be completed and provided with this response.

Please download the below documents, complete, and upload. If this designation is not applicable, please leave blank.

- [SMC LocalBusiness self-atte...](#)

No response submitted

IS THE PROPOSER A NON-PROFIT?\*

A Non-Profit is defined as a tax-exempt public charity organization (within the meaning of section 501(c)(3) of the Internal Revenue Code) that is formed for purposes other than making a profit, is exempt from paying federal income taxes on the income generated for their exempt purposes.

No

IS THE PROPOSER A LOCAL "SMALL" OR "MICRO" BUSINESS?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code:

"Small Business" means any business which holds a Small Business Certification awarded by the California Office of Small Business and Disabled Veteran Business Enterprise Services (OSDS).

"Micro Business" means any Small Business certified by the OSDS which is automatically designated by the OSDS as a Micro Business due to gross annual receipts falling below the OSDS-designated dollar amount.

If the above designations apply, please provide the OSDS provided Certification ID.

If this designation is not applicable, please leave blank.

Certification ID: 1002364

IS THE PROPOSER A LOCAL "SMALL" OR "MICRO" NON-PROFIT?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code:

“Small Non-Profit” means a Local Non-Profit with an annual revenue of \$1,000,000 to \$2,500,000 according to its most recently filed IRS Form 990.

“Micro Non-Profit” means a Local Non-Profit with an annual revenue of less than \$1,000,000, according to its most recently filed IRS Form 990.

If the above designations apply, please provide your latest filed IRS form 990. A filing from the last two calendar years is acceptable.

If this designation is not applicable, please leave blank.

No response submitted

### 3. Technical Proposal

INTRODUCTION AND EXECUTIVE SUMMARY \*

Submit a letter of introduction and executive summary of the proposal. The letter must contain:

- Name, title and contact information (email, phone, and address) for representative of proposer that is responsible for communication related to this RFP.
- Name, title, contact information, and signature of person authorized to obligate firm to perform the commitment contained in the proposal.

Submission of the letter will constitute a representation by proposer that it is willing and able to perform the commitments contained in the proposal and has not violated the terms of this RFP.

4.3.1.\_Introduction\_&\_Executive\_Summary\_-\_RDA\_Consulting\_-\_RFP\_No.\_2025-RFP-00559.pdf

STATEMENT OF MINIMUM QUALIFICATIONS \*

Describe how the proposer meets the minimum qualifications as set forth in **Minimum Qualifications** of this RFP.

Submission of the Minimum Qualifications checklist is not a substitute for providing a detailed written response.

#### 4.3.2. Statement of Minimum Qualifications Organizational Experience

*Has the Proposer been providing similar services for a minimum of four (4) years within the last seven (7) years?*

Yes. RDA has continuously provided program evaluation, strategic planning, and training/technical assistance to justice system agencies for over three decades, including multi-year initiatives for probation departments and justice system partners across California over the last seven years. Recent examples include:

- **Sonoma County Probation (2016-Present):** Multi-year AB 109 realignment evaluation that examined the full system, an evaluation of their juvenile Youth Diversion Case Management program, and a youth voice evaluation of their Secure Youth Treatment Facility (SYTF) and Less Restrictive Programs (LRPs).
- **Alameda County Probation Department (2016-2020):** Comprehensive four-year process and outcome evaluation of its AB 109 system and services.
- **Contra Costa County Probation (2019-Present):** JJCC facilitation, JJCPA/YOBG annual plan development, CBO technical assistance, comprehensive reporting, strategic planning, Pretrial Risk Assessment Tool Validation, developing a comprehensive report of their juvenile programs and services, and more.
- **Fresno County Probation (2023-Present):** AB 109 and Justice Assistance Grant (JAG) program evaluations, technical assistance to CBO's and probation to enhance data collection and reporting.
- **Los Angeles County Department of Youth Development (2021-2024):** Juvenile Diversion Evaluation with equity, cost-benefit, and sustainability analyses.
- **Yolo County Probation (2022-2024):** Validations of their juvenile risk and needs assessment tool (the Ohio Youth Assessment System) and Pretrial Risk Assessment Tool.
- **San Mateo County Executive's Office (2024-Present):** Domestic Violence Co-Response Pilot Program implementation and evaluation.

#### Program Manager Experience

*Does the proposed program manager have a minimum of two (2) years of experience within the last five (5) years in managing programs of this size?*

Yes. Carrie Coen, RDA's Director of Justice Systems and proposed Lead Project Manager (i.e., Project Sponsor), has over 25 years of continuous experience managing complex, multi-year research, evaluation, planning, and technical assistance projects. Since joining RDA in 2021, she has successfully led numerous initiatives, including Contra Costa County Probation's JJCC Technical Assistance and Evaluation, AB 109 evaluations for Fresno and Sonoma counties, and Proposition (Prop) 47 evaluations for Sonoma, Santa Clara, and Santa Barbara counties. Throughout her career, Carrie has worked with over 25 California Probation Departments, providing critical support to enhance the effectiveness of services for justice-involved individuals. Prior to RDA, Carrie was a Senior Research Associate at the University of Cincinnati Corrections Institute, where she managed a diverse range of federal, state, county, and city evaluation projects. These included a multi-state examination of juvenile risk and needs assessment implementation, an evaluation of Ohio's Prison Programs, and agency-specific assessments aimed at reducing recidivism.

#### **System for Award Management (SAM) Registration**

*Please confirm your firm is registered with the System for Award Management (SAM).* RDA's SAM registration is active and compliant with all federal requirements as of July 2025.

*What is the registered Business Name and Unique Entity ID (UEI) No.?* RDA Consulting, SPC – UEI No. K2XLRNDATD79

#### **Procurement Preference for Local Businesses and Local Non-Profits**

*Is the Proposer a "Local Business"?* No. While not headquartered in San Mateo County, RDA's location in Oakland (25 miles from Redwood City) and ongoing San Mateo County projects ensure seamless collaboration and responsiveness.

*Is the Proposer a Non-Profit?* No. RDA is a for-profit entity registered in California as a Social Purpose Corporation (SPC), a form of C corporation that prioritizes social impact alongside financial returns.

*Is the Proposer a Local "Small" or "Micro" Business?* While RDA is a certified small business, we are headquartered in Alameda County (Certification ID: 1002364).

*Is the Proposer a Local "Small" or "Micro" Non-Profit?* No, RDA is a for-profit corporation.

#### **PROJECT APPROACH\***

This section should correlate to the Scope of Work . Proposer should give a short summary describing how it will perform the relevant work

### 4.3.3. Project Approach

At RDA, we approach all research, evaluation, and strategic planning engagements with a shared set of core values, including equity, collaboration, learning, and accountability. Our methods are rooted in trauma-informed and culturally responsive practices that respect the lived experiences of justice-involved individuals and the communities that support them. Across all phases of work, we apply a strength-based, participatory, and systems-oriented lens, prioritizing approaches that are locally adaptive and designed to build capacity among our partners. This mindset is not just a method; it is the foundation for how we work with clients, community-based organizations (CBOs), and cross-system stakeholders to generate actionable insights and sustainable improvements.

#### **Approach to Research & Evaluation (Tasks 2.1, 2.3, 2.6)**

We apply our evaluation framework to a variety of adult and juvenile populations and settings, including community-based programs, system-level services, and policy initiatives. Our methods are grounded in evidence, centered in equity, and structured to support both accountability and improvement across criminal and juvenile justice systems.

Our evaluations typically follow a phased structure that ensures alignment with County priorities, stakeholder engagement, and actionable results. The process begins with a project launch phase that includes onboarding, collaborative goal setting, document review, and development of a detailed evaluation plan. We then conduct qualitative and quantitative data collection and analysis, which may involve site visits, interviews, focus groups, surveys, and case file reviews, alongside analysis of administrative data. Findings from both streams are triangulated to provide a comprehensive understanding of program implementation and outcomes. Throughout the process, we incorporate ongoing project management and communication, including regular check-ins, collaborative interpretation of findings through sensemaking and “data party” sessions, and iterative review of deliverables to ensure accuracy, relevance, and usability. This phased approach is adapted to the unique scope and timelines of each evaluation, ensuring that all work is participatory, equity-centered, and designed to support continuous improvement. Across all phases, we maintain strong coordination with staff and partners to ensure evaluations are useful, feasible, and aligned with project goals.

For **program evaluation and reporting (Task 2.1)**, this approach will be used to assess the effectiveness of juvenile programs operated by approximately 12 contracted CBOs, drawing on administrative data, client-level outcomes, and stakeholder input to produce two clear, public-facing annual reports for the Juvenile Justice Coordinating Council (JJCC). These reports will align with the objectives of the Juvenile Justice Crime Prevention Act (JJCPA), the Youthful Offender Block Grant (YOBG), the Juvenile Probation Activities Funding (JPAF), and the Juvenile Justice Realignment Block Grant (JJRBG) funding streams.

We will follow a similar phased approach when **evaluating existing resources (Task 2.3)** and **conducting research and analysis** on topics such as **Adult and Pretrial Services (Task 2.6)**. For these tasks, the phases will include collaborative scoping to clarify objectives and data needs; reviewing existing documentation and data sources to establish context; collecting and analyzing qualitative and quantitative information from stakeholders, administrative systems, and other relevant sources; and synthesizing findings into actionable recommendations. Each phase will be participatory, tailored to the specific scope, data sources, and stakeholder needs of the task, and designed to ensure that results are accurate, meaningful, and ready to implement.

### **Approach to Technical Assistance (Task 2.1)**

In tandem with our evaluation work under **Task 2.1 (program evaluation and reporting)**, RDA will provide targeted technical assistance (TA) to strengthen the capacity of CBOs to collect, analyze, and report meaningful data. Our TA approach will begin by learning about each program’s current data practices and challenges through interviews and focus groups and reviewing existing tools and workflows with both CBO and Probation staff.

Based on these findings, we will co-develop a TA plan that supports continuous quality improvement and aligns with the reporting needs of the JJCC. TA offerings may include onboarding support for new staff, alignment of reporting with shared indicators, tailored data collection instruments (e.g., surveys), and real-time coaching and feedback loops to improve data quality and utility. This TA approach will be integrated with our evaluation activities, so that CBOs have the tools, skills, and support needed to produce accurate, timely, and actionable data that directly informs program evaluation and reporting. Our approach ensures that data use is not only compliant with state and local requirements, but also accessible, actionable, and responsive to each CBO’s evolving needs and the priorities of the Probation Department.

### **Approach to Strategic Planning (Tasks 2.2, 2.4, 2.5, 2.6)**

RDA understands this work will require multiple planning deliverables, including the five-year 2030-2035 LAP, the annual JJCPA/YOBG and JJRBG plans, and the Community Corrections Partnership (CCP) Local Implementation Plan. Our planning approach is grounded in inclusive facilitation, data-informed decision-making, and the development of actionable strategies. We help partners surface shared priorities, align resources, and translate insights into measurable goals, bringing deep expertise in guiding long-range planning processes rooted in local data, community voice, and shared accountability.

For the **2030–2035 LAP (Task 2.2)**, we will adapt our strategic planning model to reflect San Mateo County’s priorities and planning infrastructure. Our participatory approach will incorporate multiple modes of engagement, including structured listening sessions with Probation, the JJCC, and key stakeholders; interviews with contracted CBOs and system partners; and sessions with community, youth,

and family groups. We will also conduct a landscape scan to assess service reach and gaps, review relevant background documents and state policy mandates, and synthesize findings into a strategic plan that is measurable, equity-centered, and implementation-ready. Findings will inform a series of collaborative sessions focused on priority setting, priority refinement, and implementation planning. At each LAP development point, RDA will lead the drafting of materials and seek iterative refinement from the appropriate parties (e.g., Probation leadership, the JJCC, or JJCC subcommittees) to ensure all deliverables are relevant and useful to the stage of the project.

For the **annual JJCPA/YOBG and JIRBG plans (Tasks 2.4, 2.5)** and the **CCP Local Implementation Plan (Task 2.6)**, our process will be scaled to recognize that these are annual state-required updates rather than large-scale planning efforts. We will facilitate a short series of meetings to collect input from relevant parties, draft the updated plans, and allow time for two rounds of Probation staff revisions and JJCC and/or CCP feedback and final approval in meetings held one month before state submission deadlines.

Across all four tasks (2.2, 2.4, 2.5, 2.6), our planning work is integrated with our research, evaluation, and TA activities, ensuring that each plan is informed by current data, stakeholder input, and actionable recommendations that support both immediate and long-term goals.

### **Approach to Cross-System Resource Analysis (Tasks 2.2, 2.3, 2.4, 2.5, 2.6)**

RDA brings a systems lens to all assessment work, recognizing that youth and adults often navigate multiple service systems, and identifying patterns, gaps, and opportunities for better coordination and accessibility. We will assess accessibility, alignment, and effectiveness of services across Probation's Juvenile Services, Institutions, and Adult and Pretrial Services Divisions, as well as services delivered by external partners in the areas of education, mental health, substance use treatment, housing, and reentry. We will use a range of methods, including service inventories, geographic information systems (GIS), demographic overlays, and gap analyses, to identify areas of duplication, fragmentation, or underinvestment, and to surface opportunities for increased alignment and improved service coordination.

As part of this work, we will lead both the annual update and comprehensive five-year revision of Probation's **Resources Guide for Youth and Their Families (Task 2.3C)**. For the annual update, activities will include reviewing the current guide for accuracy, confirming service details with providers, incorporating any newly available programs or resources, and ensuring the content remains culturally responsive and easy to navigate. For the five-year revision, we will conduct a deeper assessment, including a full review of the guide's structure and format, analysis of service accessibility and gaps, and user testing sessions with youth, families, and practitioners to

identify areas for improvement. In both processes, RDA will work closely with Probation and key stakeholders to redesign the guide to make it user-friendly, accessible, and aligned with community needs.

This cross-system resource analysis approach will support our work under **Task 2.2 (2030-2035 LAP Development)**, **Task 2.4 (JJCPA and YOBG Annual Plan)**, **Task 2.5 (JJRBG Annual Plan)**, and **Task 2.6 (CCP Local Implementation Plan)** by ensuring that a clear understanding of the service landscape informs both strategic plans and state-required updates. Our commitment is to build systems that are easier to navigate and more equitable in access and impact.

### **Approach to Pretrial Services & Other Emerging Priorities (Task 2.6)**

For areas where the Department's needs are still in development, such as Pretrial Services, RDA offers a flexible and scalable approach that can be adapted to meet the County's evolving priorities. We support co-creation of scope, pacing, and priorities, and draw on our experience in training, TA, best practice reviews, needs assessments, landscape analysis, and strategic planning to guide this work. Our team is skilled at asking the right questions to help the Probation Department clarify priorities and determine the best strategies for engaging the selected consultant.

Recognizing the evolving nature of the County's priorities related to pretrial services, we are prepared to offer a range of evaluation and TA services that the County can select based on emerging needs, available resources, and stakeholder input. These offerings may include validation of the County's pretrial risk assessment instrument ([see RDA's article on SB 36 and tool validation](#)), analysis of failure-to-appear (FTA) rates and pretrial outcomes, and alignment with evidence-based pretrial supervision practices.

We recognize pretrial systems vary across jurisdictions and continue to evolve rapidly. Our approach is designed to be responsive to the County's evolving priorities, allowing for collaborative scoping, phased implementation, and alignment with local goals and constraints. Once priorities are established, we will work closely with County stakeholders to determine the most valuable and feasible areas of focus. This flexible, tailored approach under Task 2.6 will ensure that Research and Analysis activities for Adult and Pretrial Services are actionable, evidence-informed, and aligned with the County's strategic goals.

### **Approach to Collaboration & Continuous Learning (Task 2.7)**

We will prioritize active, ongoing collaboration with Probation and other County partners throughout each phase of the project. This includes being responsive to emerging needs, surfacing questions as they arise, and providing work products that are practical, actionable, and accessible. We will also maintain open communication channels to ensure alignment with project goals, promote transparency, and adapt to evolving priorities.

Our team brings experience facilitating productive dialogue with diverse stakeholders and using *feedback* loops to inform continuous improvement. We anticipate monthly meetings with a core team from Probation to review progress, identify emerging issues, and confirm next steps. Additional meetings will be scheduled for specific initiatives, such as plan development, evaluation activities, or resource updates, and with individual Probation Department teams as needed. Between meetings, we will use shared project management tools and clear documentation to track action items, decisions, and timelines.

This collaborative, adaptive approach under **Task 2.7 (Meetings and Collaboration)** will ensure all project activities, from evaluation to strategic planning, are coordinated, transparent, and informed by the perspectives of those closest to the work, ultimately supporting improved outcomes across County systems, programs, and communities.

SCOPE OF WORK TASKS/MILESTONES\*

Describe your proposed approach to tasks/milestones

**4.3.4. Scope of Work Tasks & Milestones Task 2.1 – Program Evaluation & Reporting**

RDA will implement the County’s **juvenile justice evaluation activities** by developing data collection tools, providing TA to approximately 12 contracted CBOs, and preparing two public-facing annual reports for the JJCC. These evaluations will address programs funded by the JJCPA, YOBG, JPAF, and JJRBG. County staff will serve as reviewers of evaluation plans and draft reports and may assist with CBO coordination and TA delivery.

<b>Workplan for Task 2.1: Program Evaluation &amp; Reporting</b>			
<b>Key Activities</b>	<b>Deliverables / Milestones</b>	<b>Lead / Partner(s)</b>	<b>Timeline</b>
Collect feedback on data collection & reporting & develop recommendations for improvement	Recommendations for improvement memo	RDA (lead), Probation (feedback)	Q1 2026
Design data collection tools & protocols for CBO use (e.g., outcome measures, logic models, survey tools)	Toolkits & protocols for CBOs	RDA (lead), CBOs (implementers), Probation (TA coordinators)	Q1 updated annually

Provide ongoing TA to CBOs on data quality & reporting	Ongoing CBO TA sessions & ad-hoc coaching	RDA (lead), CBOs (recipients), Probation (TA coordinators)	Ongoing 2026–2030
Develop evaluation plan & reporting templates aligned with JJCPA, YOBG, JPAF, & JIRBG requirements	Annual evaluation plan templates & structure finalized	RDA (lead), Probation (reviewers)	Q1 updated annually
Collect & analyze program- & system-level data to assess service reach, quality, & outcomes	Annual summary of evaluation findings	RDA	Annually, beginning in Q2 2026
Prepare & present annual reports to the JJCC (2)	JJCPA/YOBG & JIRBG Annual Reports	RDA (lead), Probation (co-presenters)	Delivered Q3 annually (Nov JJCC meetings)
Conduct review & improvement cycle for tools & TA approach	Updated tools & recommendations memo	RDA	Q1 2027–2030

### Task 2.2 – LAP Development

RDA will lead the development of San Mateo County’s 2030–2035 Local Action Plan (LAP) by facilitating an inclusive, data-informed planning process that reflects County priorities and JJCC guidance. We will engage system stakeholders, CBOs, youth, and families through a variety of input-gathering methods; conduct landscape and policy scans; and draft a strategic, measurable LAP.

Data analysis will be conducted using tools such as NVivo for qualitative coding and visualization software for quantitative insights, with an emphasis on co-interpreting findings alongside County partners through an iterative meaning-making process. Probation will help identify participants, co-facilitate key sessions, and review interim and final deliverables.

<b>Workplan for Task 2.2: 2030-2035 LAP Development</b>			
<b>Key Activities</b>	<b>Deliverables / Milestones</b>	<b>Lead / Partner(s)</b>	<b>Timeline</b>
Design planning process & stakeholder engagement strategy	Workplan & timeline for LAP development	RDA (lead), Probation (reviewers)	Q1 2029

Conduct landscape scan of service gaps, population & community needs, & system investments	Summary findings memo & data visualizations	RDA	Q2 2029
Facilitate input-gathering activities (e.g., interviews, listening sessions, & engagement with youth & families to inform plan priorities)	Meeting summaries & thematic synthesis	RDA (lead), Probation (co-facilitators), CBOs (participants)	Q2–Q3 2029
Analyze LAP qualitative & quantitative data using NVivo & visualization tools; facilitate iterative meaning-making with County partners	Coded qualitative dataset using NVivo; quantitative analysis summaries; co-interpreted findings memos	RDA (lead), Probation (collaborators)	Q3 2029
Draft LAP, including goals, strategies, indicators, & alignment with County & JJCC priorities	Draft LAP for County & JJCC review	RDA (lead), Probation (reviewers), JJCC (feedback providers)	Q4 2029
Finalize & present 2030–2035 LAP	Final LAP submitted to County & JJCC; presentation materials	RDA (lead), Probation (co-presenters)	Q1 2030
Prepare summary materials for community dissemination	Executive summary, infographics, & outreach slide deck	RDA	Q2 2030

### Task 2.3 – Evaluation of Existing Resources

RDA will conduct a **comprehensive assessment of existing services for juvenile, including transitional-age youth (TAY), and one for adult populations**, with a focus on accessibility, alignment, and effectiveness. This work will include services delivered by system partners in education, behavioral health, housing, and reentry.

Activities will involve reviewing program documentation and service utilization data (e.g., referrals, enrollments, completion rates), analyzing outcome data, and identifying service gaps by comparing risk and needs assessment results to actual service use. We will

also conduct equity analyses to ensure resources are targeted to key populations in the RFP, including those involved with law enforcement and Probation, education, mental health, social services, drugs and alcohol, and batterers intervention programs.

In parallel, RDA will lead the **annual update and comprehensive five-year revision** of Probation’s **Resources Guide for Youth and Their Families**. The annual update will focus on reviewing and verifying content for accuracy, incorporating new programs or resources, and maintaining the guide’s accessibility and cultural responsiveness. The comprehensive five-year revision will involve a more in-depth review of the guide’s structure and format, updated analyses of service accessibility and gaps, and user testing sessions with youth, families, and practitioners to identify and prioritize improvements. Across both processes, RDA will work closely with Probation and key stakeholders to ensure the guide remains user-centered, easy to navigate, and responsive to the needs of those it serves. Probation will support access to materials, provide feedback on tools, and participate in the development and review of updated versions.

<b>Workplan for Task 2.3: Evaluation of Existing Resources</b>			
<b>Key Activities</b>	<b>Deliverables / Milestones</b>	<b>Lead / Partner(s)</b>	<b>Timeline</b>
Develop framework & criteria to assess existing services (e.g., accessibility, cultural responsiveness, geographic coverage)	Finalized assessment framework	RDA (lead), Probation (reviewers)	Q2 2026
Collect & synthesize program documentation, service data, & related materials	Service inventory & data summary	RDA	Q3–Q4 2026
Conduct equity mapping & gap analysis using tools such as GIS & demographic overlays	Findings memo with visualizations	RDA	Q1 2027
Engage youth, families, & CBO partners to review findings & provide input on interpretation	Summary of stakeholder input on findings	RDA (lead), Probation (co-facilitators), CBOs, youth/family participants	Q1–Q2 2027
Prepare & present report on Evaluation of Existing Resources	Evaluation of Existing Resources Report & presentation	RDA (lead), Probation (co-presenters)	Q3–Q4 2027

<b>Annual update to the Resources Guide:</b> Review for accuracy, incorporate new resources, ensure cultural responsiveness	Updated Resources Guide (annual)	RDA (lead), Probation (reviewers)	Q3–Q4 Annually
<b>Five-year comprehensive revision to the Resources Guide:</b> Full structural review, updated service gap analysis, user testing	Updated Resources Guide (comprehensive)	RDA (lead), Probation (reviewers)	Q2–Q3 2029

#### Task 2.4 – JJCPA/YOBG Annual Plan

RDA will support the County in preparing the state-mandated **annual update** to the JJCPA/YOBG plan for submission to the Board of State and Community Corrections (BSCC). This process will focus on revising prior-year content to reflect current program descriptions, funding allocations, and any changes in goals or strategies.

Each year, RDA will facilitate planning meetings with Probation to confirm programmatic and budget updates, incorporate revisions from contracted CBOs and County program leads, and maintain the internal tracking spreadsheet that summarizes year-to-year program details. RDA will prepare an updated draft plan for County and JJCC review, incorporate two rounds of feedback, and finalize the plan for JJCC approval.

While the County may choose to include outcome data or qualitative findings, the State does not require extensive data reporting as part of this submission. Probation will coordinate internal stakeholders and CBOs to confirm all updates before final submission.

<b>Workplan for Task 2.4: JJCPA/YOBG Annual Plan</b>			
<b>Key Activities</b>	<b>Deliverables / Milestones</b>	<b>Lead / Partner(s)</b>	<b>Timeline</b>
Host planning meetings with Probation team	Annual report development timeline	RDA (lead), Probation (reviewers)	Q1 annually
Develop draft plan and collect feedback from Probation team	Internal data summary spreadsheet	RDA (lead), Probation (data providers), CBOs (contributors)	Q1 annually
Present plan to JJCC & collect feedback	Draft JJCPA /YOBG report for County review	RDA (lead), Probation (reviewers)	Q2 annually

Revise plan, submit for Probation review, & then present for JJCC approval	Final JJCPA/YOBG Annual Report	RDA (lead), Probation (submitters)	Q2 annually
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**Task 2.5 – JIRBG Annual Plan**

RDA will support the County in preparing the state-mandated **annual update** to the JIRBG Plan for submission to the Office of Youth and Community Restoration (OYCR). This process will focus on updating prior-year plan content to reflect changes in the realigned youth population, available services and placements, and local strategies for meeting secure track and reentry needs.

Activities will include reviewing the current plan and legislative requirements, hosting planning meetings with Probation to confirm updates, conducting targeted landscape scans to capture new or changed resources, and incorporating feedback from youth, families, community partners, and the JJCC. RDA will prepare an updated draft plan for County and JJCC review, facilitate two rounds of revisions, and finalize the plan for JJCC approval and OYCR submission.

<b>Workplan for Task 2.5: JIRBG Annual Plan</b>			
<b>Key Activities</b>	<b>Deliverables / Milestones</b>	<b>Lead / Partner(s)</b>	<b>Timeline</b>
Review current JIRBG Plan, OYCR requirements, & local legislative updates	Summary of review findings	RDA (lead), Probation (reviewers)	Q1 annually
Conduct targeted landscape scan of programs, services, & system capacity for realigned youth	Service landscape findings memo	RDA	Q1 annually
Facilitate input from JJCC, youth & families, & CBO partners	Input summary & participation log	RDA (lead), Probation (co-facilitators), JJCC & community stakeholders (participants)	Q2 annually
Draft updated JIRBG Plan content, including goals, strategies, & capacity details	Draft plan for County & JJCC review	RDA (lead), Probation (reviewers), JJCC (feedback providers)	Q2 annually
Finalize & package plan for OYCR submission	Final JIRBG Plan & submission-ready materials	RDA (lead), Probation (submitters)	Q2 annually

**Task 2.6 – Adult & Pretrial Services Research & Analysis**

RDA will partner with the County to support research, evaluation, and data infrastructure priorities for the Adult and Pretrial Services Divisions. This work includes two distinct components: 1) preparation of the state-mandated **CCP Local Implementation Plan** and 2) **Research and Analysis activities tailored to Adult and Pretrial Services**. Each will be approached using tailored strategies and processes.

***Adult Services - CCP Local Implementation Plan***

RDA will support the County in preparing the annual update to the CCP Local Implementation Plan for submission to the Board of State and Community Corrections (BSCC). This process will focus on updating prior-year content to reflect current program descriptions, funding allocations, and any changes in strategies or goals. Activities will include reviewing the current plan and legislative requirements, hosting planning meetings with Probation to confirm updates, conducting targeted landscape scans to capture new or changed resources, and incorporating feedback from the CCP. RDA will prepare an updated draft plan for County and CCP review, facilitate two rounds of revisions, and finalize the plan for CCP approval and BSCC submission. While outcome data and qualitative insights may be incorporated at the County’s discretion, the BSCC does not require extensive data reporting for this deliverable.

<b>Workplan for Task 2.6: Adult Services CCP – Local Implementation Plan</b>			
<b>Key Activities</b>	<b>Deliverables / Milestones</b>	<b>Lead / Partner(s)</b>	<b>Timeline</b>
Host planning meetings with Probation team	Annual report development timeline	RDA (lead), Probation (reviewers)	Q3 annually
Develop draft plan and collect feedback from Probation team	Internal data summary spreadsheet	RDA (lead), Probation (data providers), CBOs (contributors)	Q3 annually
Present plan to CCP & collect feedback	Draft plan for County review	RDA (lead), Probation (reviewers)	Q3 annually
Revise plan, submit for Probation review, & then present for CCP approval	Final CCP Local Implementation Plan	RDA (lead), Probation (submitters)	Q4 annually

***Pretrial Services Research & Analysis***

Given the scope of work in this area is still evolving, RDA will use a flexible and scalable approach that allows the County to phase in specific activities over time, based on emerging needs, data availability, and stakeholder priorities. The activities listed below are **examples of potential project activities** the County may choose to pursue, depending on the priorities established during the initial scoping process.

- Conducting data inventories to assess availability, quality, and gaps in existing information.
- Analyzing trends in service use, supervision outcomes, or pretrial decision-making.
- Supporting the validation of the County’s pretrial risk assessment instrument in alignment with SB 36.
- Providing targeted technical assistance aligned with national best practices in community corrections.

This work will be sequenced to prioritize foundational scoping and planning efforts, followed by more advanced analyses and evaluation activities. RDA and Probation will co-lead scoping efforts and coordinate closely with relevant departments to identify data sources and key stakeholders.

<b>Sample Workplan for 2.6: Pretrial Services Research &amp; Analysis</b>			
<b>Key Activities</b>	<b>Deliverables / Milestones</b>	<b>Lead / Partner(s)</b>	<b>Timeline</b>
Co-define scope of work & priority research areas with Probation	Scoping summary memo	RDA (lead), Probation (co-leads)	Q1–Q2 2026
<b>Example Activity:</b> Conduct data inventory & review of data availability, gaps, & quality	Data scan summary	RDA	Q2–Q3 2026
<b>Example Activity:</b> Analyze trends in service use, supervision outcomes, & pretrial decision points	Research findings memo	RDA	Q4 2026–Q2 2027
<b>Example Activity:</b> Support validation of pretrial risk assessment instrument (per SB 36)	Validation plan, technical analysis, & summary report	RDA (lead), Probation (data providers)	Timing TBD (2026–2028 placeholder)

### Task 2.7 – Meetings & Collaboration

RDA will participate in regular meetings with County staff and key stakeholders to support collaboration, transparency, and responsiveness throughout the project. We anticipate attending monthly virtual project check-ins, quarterly in-person JJCC meetings, and ad hoc working sessions (virtual or in-person, depending on purpose and participants) as needed. RDA will also participate in broader systems-level planning meetings when appropriate and provide timely materials and summaries to facilitate productive discussions.

Probation will help RDA coordinate meeting logistics (especially for in-person and large-scale events like listening sessions), identify project priorities, ensure the appropriate stakeholders are included, and support RDA’s work, including:

- Assigning one or more staff members to serve as the primary point of contact, participating in regular project progress updates, and remaining available to address or escalate issues.
- Responding in a timely fashion to information requests and deliverable reviews, with reasonable timelines agreed upon during planning.
- Providing required data for all activities.
- Introducing the RDA team to project stakeholders through participation in meetings and other communications.
- Assisting with logistics for site visits, focus groups, and key informant interviews, when appropriate.
- Coordinating review of tools and deliverables, collecting feedback from the required bodies (e.g., JJCC, CCP) and other relevant stakeholders to support revisions.

<b>Workplan for 2.7: Meetings &amp; Collaboration</b>			
<b>Key Activities</b>	<b>Deliverables / Milestones</b>	<b>Lead / Partner(s)</b>	<b>Timeline</b>
Participate in monthly virtual project check-ins with County staff	Meeting participation & follow-up summaries	RDA (participants), Probation (organizers)	Monthly (2026–2030)

Attend quarterly in-person JJCC meetings & present updates as requested	Presentation materials & progress summaries	RDA (presenters), Probation (co-presenters)	Quarterly (2026–2030)
Join ad hoc working sessions (virtual or in person, as needed) to support activities such as LAP, JIRBG, CCP, & evaluation activities	Agendas, notes, & materials as needed	RDA (participants), Probation (co-facilitators)	As needed (2026–2030)
Participate in systems-level planning meetings when appropriate	Participation records & optional summary memos	RDA	As needed (2026–2030)

**PROPOSED SCHEDULE \***

Attach proposed schedule reference ability to complete the project within the County's required time frame

4.3.5. [\\_Proposed\\_Schedule\\_-\\_RDA\\_Consulting\\_-\\_RFP\\_No.\\_2025-RFP-00559.pdf](#)

**INNOVATIONS\***

Reference any notable innovations or improvements that you expect to provide (with respect to, for example, efficiency, technology, sustainability)

**4.3.6. Innovations**

RDA brings a forward-looking, equity-centered approach to enhance the San Mateo County Probation Department’s research, evaluation, and planning efforts, introducing innovations that surpass standard methods to deliver lasting value. Our approach integrates strategic planning, technical assistance (TA), and evaluation to strengthen the justice system, ensuring actionable, community-driven outcomes that align with the RFP’s goals (Tasks 2.1–2.6).

**Participatory Engagement for Actionable Insights:** We will elevate stakeholder engagement through participatory “data party” sessions, where CBOs, JJCC members, and justice-involved individuals co-analyze data to inform Task 2.1 JJCC reports and Task 2.2 Local Action Plan (LAP). Drawing on our Contra Costa County JJCC facilitation, we’ll host workshops to develop theories of change, ensuring deliverables reflect community voice and equity, per the RFP’s public engagement focus (Section 2.2.B). These methods, unlike traditional assessments, foster co-ownership and relevance for San Mateo’s diverse population.

**Technology-Driven Solutions:** We will leverage GIS mapping to identify service gaps for Task 2.3 (resource assessment), overlaying demographic and program data to pinpoint high-risk areas. This builds on our San Mateo MHSAs evaluations, offering a technological edge over standard dashboards and enhancing sustainability by providing adaptable tools for County use. For Task 2.6 (pretrial services), we'll develop digital templates for failure-to-appear (FTA) analyses, informed by our SF Pretrial work (3,700 participants), to address emerging priorities.

**Living Deliverables for Sustainability:** Our evaluation reports, TA toolkits, and planning documents (Tasks 2.1, 2.4, 2.5) will be designed as living resources, using editable formats (e.g., online dashboards, templates) that County staff and CBOs can update post-contract. We'll provide real-time coaching and capacity-building workshops to ensure staff confidence in maintaining these tools, supporting long-term impact.

**Flexible, Scalable Structure:** Our project approach allows rapid scaling to meet evolving needs, particularly for Task 2.6. We'll bring in subject matter experts (e.g., pretrial risk tool specialists) and synthesize learnings across tasks, ensuring responsiveness and continuous improvement through collaborative feedback loops.

**We will approach this project, not just as independent activities, but as an opportunity to strengthen the full justice system.** We will integrate strategic planning, TA, and evaluation so that learning is continuous, actionable, and centered in community voice. Our work plan will elevate stakeholder engagement at every stage, whether through collaborative development of theories of change, co-led strategic planning sessions, or participatory "data party" sessions that bring findings to life. These strategies will help ensure that final deliverables are not only rigorous, but also relevant and useful to County partners, CBOs, and decision-makers.

These innovations—participatory engagement, GIS technology, living deliverables, and flexibility—position RDA as a strategic partner, delivering superior value and equity-focused solutions to advance San Mateo's goals of reducing recidivism and enhancing community safety.

#### PERFORMANCE MEASURES\*

Describe a plan for achieving performance measures

##### 4.3.7. Performance Measures

The RDA team will use a structured, data-driven approach to ensure we meet all performance measures across research and evaluation, planning, technical assistance (TA), and annual plan updates. This includes setting clear work plans, timelines, deliverables,

and performance metrics for each project component that will be discussed at least monthly with the Probation team. For example, for Task 2.2 (LAP Development), we'll measure stakeholder engagement based on how many stakeholders should be engaged (e.g., 50+ participants in listening sessions).

We will implement a system for regular progress monitoring, including point-in-time satisfaction surveys for Probation partners and stakeholders for relevant touchpoints and a yearly Probation and stakeholder satisfaction survey that will be used to inform and improve upcoming work at each new year.

Finally, we will incorporate a continuous improvement approach, using findings from evaluations, feedback from TA recipients and training participants, and data from performance tracking to revise the annual plan and improve future implementation.

#### FIRM QUALIFICATIONS \*

Attach information regarding background and qualifications, including the following:

- A brief description of the proposer.
- A description of not more than three (3) projects similar in size and scope conducted by the proposer, including the client, reference and telephone numbers, primary staff members involved, budget, schedule, and project summary. Descriptions should be limited to one (1) page for each project.
- If subcontractors are anticipated, identify them (if known) and provide information on how they will be used.

4.3.8. [\\_Firm\\_Qualifications\\_-\\_RDA\\_Consulting\\_-\\_RFP\\_No.\\_2025-RFP-00559.pdf](#)

#### TEAM QUALIFICATIONS\*

Provide a chart identifying:

- Project team and reporting structure
- Lead project manager
- Role each person will play in the project

Provide a brief description of the experience and qualifications of the project team members, including short resumes if desired.

Written assurance that the key individuals listed and identified will be performing the work and will not be substituted or reassigned without the County's prior approval

4.3.9. [\\_Team\\_Qualifications\\_-\\_RDA\\_Consulting\\_-\\_RFP\\_No.\\_2025-RFP-00559.pdf](#)

#### REFERENCES\*

Provide 2 references for each of the following, including the name, position/title, address, email, and telephone number of recent clients (preferably other public agencies):

4.3.10. [\\_References\\_-\\_RDA\\_Consulting\\_-\\_RFP\\_No.\\_2025-RFP-00559.pdf](#)

#### FEE PROPOSAL\*

The Fee Proposal should be submitted as a separate PDF file from the Technical Proposals detailed in Required Documents.

The County reserves the right to accept other than the lowest priced offer and to reject any proposals that are not responsive to this request.

4.3.11. [\\_Fee\\_Proposal\\_-\\_RDA\\_Consulting\\_-\\_RFP\\_No.\\_2025-RFP-00559.pdf](#)

### 4.3.1. Introduction and Executive Summary

Yanitxa Albino  
Management Analyst  
County of San Mateo Probation Department

Dear Yanitxa Albino,

In an era of transformative juvenile justice reforms like Senate Bill 823, RDA Consulting, SPC (RDA) is pleased to submit this proposal in response to San Mateo County's Research and Evaluation Services RFP No. 2025-RFP-00559. We are proposing for both service areas (Juvenile Services and Adult and Pretrial Services) structured around a five-year term to support both ongoing evaluation and strategic planning efforts, reflecting our capacity to deliver specialized, coordinated research and evaluation across the Department's full portfolio.

Founded in 1984, RDA is a mission-driven, employee-owned consulting firm with four decades of experience conducting evaluations, strategic planning, and continuous quality improvement initiatives for justice system agencies across California. We have extensive experience in each service area sought by the County.

- ✓ For Juvenile Services, our longstanding partnership with Contra Costa County Probation since 2019 includes JJCC meeting planning and facilitation, JJCPA and YOBG Annual Plan development, and technical assistance (TA) to community-based organizations (CBOs) delivering JJCPA and YOBG-funded services for collecting and reporting data. We also produced the County's first-ever comprehensive report for juvenile services in 2021, informing strategies that served over 1,000 youth annually through JJCPA and YOBG programs, and are updating it for 2026. Additionally, we conducted a multi-year evaluation for Los Angeles County's Department of Youth Development (DYD), examining juvenile diversion program implementation, outcomes, equity, cost-effectiveness, and sustainability (enhancing service equity for thousands of youths across the county).
- ✓ For Adult Services, we have conducted multi-year AB 109 evaluations in Sonoma and Fresno counties on behalf of their Community Corrections Partnerships (CCPs), assessing system-level outcomes, equity, recidivism, and reinvestment strategies in alignment with local implementation plans (informing strategies that strengthened reentry and reduced recidivism across evaluated programs). We also performed an evaluation on diversion programs for Santa Barbara County Probation and are currently working with the CCP to develop a strategic plan to improve the effectiveness of the Department's services. In addition, we are assisting Napa County Probation in setting strategic priorities for the CCP to drive system improvements.
- ✓ In Pretrial Services, we bring a deep portfolio of work, including recent validations of different pretrial risk assessment tools for Yolo and Contra Costa counties (ensuring compliance with SB 36 and improving equity in release decisions), multiple evaluations for the San Francisco Pretrial Diversion Project (analyzing outcomes for nearly 3,700 participants), and a research study funded by Arnold Ventures to improve court appearance rates in Santa Cruz County (delivering recommendations that enhanced court attendance through targeted interventions).

## San Mateo County Probation Department

*RFP No. 2025-RFP-00559: Research and Evaluation Services*

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Our team brings deep familiarity with San Mateo County’s priorities and stakeholder landscape, grounded in our history of active engagement across multiple projects. Since 2017, we continue to support the County’s Behavioral Health and Recovery Services Division conducting multi-year evaluations on over a dozen Mental Health Services Act (MHSA)-funded initiatives spanning behavioral health, public health, and community safety. Additionally, we are currently conducting a multi-year evaluation of the Domestic Violence Co-Response Pilot Program for the County Executive’s Office, as well as working with the San Mateo Police Department as part of a Board and State and Community Corrections (BSCC) funded Organized Retail Theft (ORT) evaluation.

RDA proposes a collaborative, equity-centered approach to deliver comprehensive research, evaluation, planning, and TA services across Juvenile, Adult, and Pretrial divisions. Leveraging our 40+ years of justice expertise, we’ll provide TA, produce clear reports, facilitate plan updates with public engagement, and conduct targeted analyses as needed using mixed-methods data, participatory evaluation (PE) approaches, and innovations like GIS mapping and data parties for resource gap analysis and stakeholder engagement. Our Justice Practice team, led by Director of Justice Systems Carrie Coen, ensures timely deliverables within a 5-year term, including two annual JJCC reports and the 2030–2035 Local Action Plan, promoting data-driven improvements and sustainability. This builds on our San Mateo partnerships to advance fairness, reduce recidivism, and enhance community safety.

Our team includes seasoned justice system planners, facilitators, and evaluators with a strong track record of managing complex, multi-year projects for probation departments, behavioral health agencies, and CBOs. We integrate equity-focused, data-driven methods with accessible reporting and collaborative engagement to support system improvement.

As Chief Executive Officer, I am authorized to negotiate, bind, and execute agreements on behalf of RDA. I will serve as the point of contact for this proposal and confirm that RDA is prepared to meet all requirements outlined in the RFP. Our team looks forward to discussing how RDA’s flexible, data-informed strategies can support San Mateo’s goals for reducing recidivism and promoting community safety.

Thank you for considering our proposal. We are enthusiastic about the opportunity to partner with San Mateo County Probation to strengthen and inform your work through high-quality evaluation and research services.



Amalia Egri Freedman | Chief Executive Officer  
RDA Consulting | EIN: 68-0444084  
330 Franklin Street, Suite 400, Oakland, CA 94607  
afreedman@RDAconsulting.com | (510) 488-434

#### 4.3.5. Proposed Schedule

The proposed schedules on the following pages outline the sequencing of major tasks for both Juvenile Services and Adult & Pretrial Services project activities, including key coordination points to ensure alignment between workstreams.

RDA's dedicated project team has a strong track record of delivering complex, multi-stakeholder projects on time and within scope for counties across California.

Using structured project management tools and regular milestone tracking, we will ensure that all deliverables are completed within San Mateo County's required timeframe while maintaining flexibility to adapt to evolving needs.

Juvenile Services Schedule 2026-2028

Juvenile Services Tasks	2026												2027												2028												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
<i>Task 2.1. Program Evaluation &amp; Reporting</i>																																					
Data Collection Feedback																																					
Develop Data Collection Tools																																					
Provide Ongoing CBO Data TA																																					
Develop Evaluation Plans for Annual Reports																																					
Data Collection & Analysis																																					
YOBG & JJRBG Annual Report & Presentation																																					
JJCPA & JPAF Annual Report & Presentation																																					
<i>Task 2.3. Evaluation of Existing Resources</i>																																					
Develop Evaluation Framework																																					
Collect & Analyze Data																																					
Stakeholder Input																																					
Resources Evaluation Report & Presentation																																					
Resources Guide Annual Update																																					
5-Year Comprehensive Resources Guide Update																																					
<i>Tasks 2.4 &amp; 2.5. Juvenile Annual Plans</i>																																					
Develop JJCPA & YOBG Annual Plan																																					
Develop JJRBG Annual Plan																																					
<i>Task 2.7. Meetings &amp; Collaboration</i>																																					
Launch Meetings & Project Discovery																																					
Probation Monthly Meetings																																					
JJCC Quarterly & DJJ Realignment Meetings																																					
CBO Quarterly Meetings																																					

**Juvenile Services Schedule 2029-2030**

Juvenile Services Tasks	2029												2030											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<i>Task 2.1. Program Evaluation &amp; Reporting</i>																								
Data Collection Feedback	█	█											█	█										
Develop Data Collection Tools		█	█											█	█									
Provide Ongoing CBO Data TA			█	█	█	█	█	█	█	█	█	█			█	█	█	█	█	█	█	█	█	█
Develop Evaluation Plans for Annual Reports			█	█											█	█								
Data Collection & Analysis					█	█	█	█	█	█	█	█					█	█	█	█	█	█	█	█
YOBG & JJRBG Annual Report & Presentation								█	█	█	█	█								█	█	█	█	█
JJCPA & JPAF Annual Report & Presentation								█	█	█	█	█								█	█	█	█	█
<i>Task 2.2. 2030-2035 LAP Development</i>																								
Planning & Stakeholder Engagement Design	█	█	█																					
Conduct Landscape Analysis				█	█	█																		
Facilitate Input Gathering Activities					█	█	█	█																
LAP Data Analysis							█	█	█	█														
Develop Draft LAP										█	█	█												
Finalize LAP & Presentation													█	█	█									
Prepare Community Summary Materials																	█	█						
<i>Task 2.3. Evaluation of Existing Resources</i>																								
Resources Guide Annual Update																					█	█	█	█
5-Year Comprehensive Resources Guide Update				█	█	█	█	█	█	█														
<i>Tasks 2.4 &amp; 2.5. Juvenile Annual Plans</i>																								
Develop JJCPA & YOBG Annual Plan	█	█	█	█									█	█	█	█								
Develop JJRBG Annual Plan	█	█	█	█									█	█	█	█								
<i>Task 2.7. Meetings &amp; Collaboration</i>																								
Launch Meetings & Project Discovery																								
Probation Monthly Meetings	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
JJCC Quarterly & DJJ Realignment Meetings		█			█			█			█			█			█			█			█	
CBO Quarterly Meetings			█			█			█			█			█			█			█			█

**Adult and Pretrial Services Schedule 2026-2030**

Adult & Pretrial Services Tasks	2026												2027												2028-2030											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<i>Task 2.3 Evaluation of Existing Resources</i>																																				
Develop Evaluation Framework																																				
Collect & Analyze Data																																				
Stakeholder Input																																				
Resources Evaluation Report & Presentation																																				
<i>Task 2.6 Adult &amp; Pretrial Services R&amp;A</i>																																				
CCP Local Implementation Plan																																				
Adult & Pretrial Services Evaluation TBD																																				
<i>Task 2.7 Meetings &amp; Collaboration</i>																																				
Launch Meetings & Project Discovery																																				
Probation Monthly Meetings																																				
CCP Meetings																																				
Project Management & Internal Meetings																																				

### 4.3.8. Firm Qualifications

#### RDA Overview

RDA Consulting, SPC (RDA) is a mission-driven, employee-owned consulting firm based in Oakland, California. Founded in 1984 as a grant writing firm, RDA has since grown into a full-service consultancy providing research, evaluation, strategic planning, community engagement, meeting facilitation, training, technical assistance (TA) and capacity-building services across the justice and health and human services sectors. Our work is grounded in a commitment to advancing equity, strengthening public systems, and supporting communities through data-informed decision-making.

Our multidisciplinary team brings expertise in evaluation, planning, and facilitation across a range of policy and service areas, with a strong emphasis on supporting county and community-based efforts in justice reform, behavioral health, and systems integration. We specialize in mixed-methods research and applied studies that inform practice, promote continuous improvement, and support accountability to stakeholders and the communities they serve.

Over the past four decades, RDA has contributed to initiatives in areas including juvenile and adult justice, behavioral health, education, housing and homelessness, violence prevention, and child and family welfare. In all engagements, we prioritize meaningful community engagement to elevate the voices of those most impacted by public systems.

Each year, RDA manages more than 75 active projects across California. Our structure allows us to provide stable project teams that offer relevant expertise, responsive collaboration, and consistent delivery of high-quality work.

#### Subcontractors

RDA is proposing this engagement with San Mateo County as an independent organization, working without partners or subcontractors.

## RDA Qualifications

### Contra Costa County Probation Department

**Contact Person:** Esa Ehmen-Krause, Chief Probation Officer  
**Address:** 50 Douglas Drive Suite 201, Martinez, CA 94553  
**Telephone Number:** (925) 313-4188  
**Email:** esa.ehmen@prob.cccounty.us

**Project:** Technical Assistance & Evaluation Services

**Dates:** 9/1/2019 – Present

**Total Budget:** \$1,811,387

**Primary Staff:** Carrie Coen (Project Manager), Stephanie Duriez (Project Sponsor), Penelope Ferguson, Jennifer Lux, Tyeisha Fordham, Fabian Rivera Reyes, Madeline Lancaster

RDA serves as Contra Costa County Probation’s strategic partner for juvenile justice prevention and intervention programming. This long-standing engagement includes mixed-methods evaluation, strategic planning, and capacity-building for JJCPA- and YOBG-funded programs. In alignment with RFP Sections 2.1, 2.3, 2.4, 2.5, 2.6, and 2.7, RDA facilitates the Juvenile Justice Coordinating Council (JJCC) and subcommittees and prepares the JJCPA-YOBG Consolidated Annual Plan. We manage agendas, materials, logistics, and stakeholder participation to support transparency, alignment, and consensus-building.

We support over 10 funded CBOs with performance metrics, logic models, reporting tools, and data reporting technical assistance. RDA analyzes reported data, prepares annual summaries, and supports presentations to the JJCC, ensuring compliance with state guidelines and supporting data-informed decision-making. We also authored the County’s first [2021 Report on Juvenile Programs and Services](#), which assessed the service landscape and included a provider inventory survey to capture community-based services.

In addition to evaluation and planning, we provide strategic advising on equity-informed approaches to system improvement. This includes facilitating the Transitional Age Youth (TAY) Services Network, advising on CalAIM implementation to strengthen access to medical and behavioral health services, and supporting the Office of Reentry and Justice with the refinement of RFPs, development of provider standards, and improved use of data to monitor and strengthen service delivery.

RDA has conducted an interrater reliability study, validated the County’s pretrial risk assessment tool, and is currently validating the Department’s risk and needs assessment tools. These efforts enhance the reliability and fairness of decision-making tools used throughout the probation system. We also support the Department’s Evidence-Based Practices and Continuous Quality Improvement Unit in ensuring fidelity to serviced intended to reduce recidivism.

We also deliver tailored training to build staff and provider capacity. Since 2019, RDA has provided approximately 10 trainings to 200 participants, including probation officers, non-sworn staff, and contracted providers. Training topics have included evidence-based practices, the Risk, Need, and Responsivity (RNR) model, case planning, cognitive-behavioral interventions, fidelity, continuous quality improvement, logic models, and data collection. These trainings support a shared understanding of best practices and promote consistent, high-quality service delivery across the system.

Los Angeles County Department of Youth Development

**Contact Person:** Sahar Moheize, Research, Policy, and Innovation Program Director

**Address:** 320 W. Temple St., 7th Floor, Los Angeles, CA 90012

**Telephone Number:** (213) 584-4307

**Email:** smoheize@dyd.lacounty.gov

**Project:** Youth Diversion and Youth Development Services Evaluation

**Dates:** 12/01/2021 – 4/30/2024

**Total Budget:** \$714,933

**Primary Staff:** Carrie Coen (Project Sponsor), Stephanie Duriez (Project Manager), Penelope Ferguson, Jennifer Lux, Fabian Rivera Reyes

**Description:** RDA led a multi-year process and outcome evaluation of Los Angeles County’s youth diversion programming administered through the Department of Youth Development (DYD). This work aligns directly with the RFP’s requested scope in multiple areas (i.e., 2.1, 2.3, 2.6, and 2.7) and demonstrates our ability to evaluate justice system-level strategies through a youth-centered, equity-focused lens.

RDA’s evaluation scope included a countywide assessment of diversion program implementation, outcome tracking, and development of metrics used by DYD and partner agencies to monitor performance. We worked with a network of 50+ community-based providers and coordinated with system stakeholders including law enforcement agencies, Probation, the District Attorney’s Office, and the Public Defender. RDA evaluated diversion programming by region and tracked youth outcomes using administrative and programmatic data sources.

A central element of this work was the Participatory Action Research (PAR) process. RDA recruited and trained youth with lived experience to serve as co-researchers, guiding the design and facilitation of focus groups with youth and caregivers across the County. This methodology ensured community voice was reflected in every stage of the evaluation.

Project deliverables included: a theory of change for youth diversion, countywide metrics aligned with key system goals, process and outcome evaluations, [equity analysis](#), cost-benefit study, sustainability and replicability assessment, and strategic recommendations to inform future implementation. In coordination with DYD, RDA also developed tailored briefs for County departments and regional partners to support learning and continuous improvement.

The project spanned more than two years, from early design in late 2021 through final deliverables in 2024 and was structured to align with DYD’s pilot implementation schedule. RDA provided monthly progress updates, facilitated feedback sessions with DYD and system leaders, and adapted evaluation activities in response to emerging questions and data availability. Findings supported the County’s youth development framework and helped secure future investment in diversion.

City of San José Office of the City Manager

**Reference Contact:** Laura Buzo, Assistant to the City Manager  
**Address:** 200 E. Santa Clara Street, 9th Floor  
**Telephone Number:** (408) 592-0372  
**Email:** laura.buzo@sanjoseca.gov

**Project:** Children and Youth Services Master Plan Development

**Dates:** 8/01/2022 – 6/30/2024

**Total Budget:** \$239,930

**Primary Staff:** Carrie Coen (Project Sponsor), Courtney Chapple (Project Manager), Stephanie Duriez, Jamon Franklin

**Description:** RDA partnered with the City of San José to lead the development of its first-ever Children and Youth Services Master Plan (CYSMP), a citywide initiative designed to strengthen service delivery systems and promote equitable outcomes for children and youth. This project aligns with the RFP’s Local Action Plan (2.2) category and scope of work elements focused on comprehensive planning, interagency coordination, and development of data-informed strategies to guide resource allocation and policy decisions. To support this effort, RDA conducted a robust mixed methods needs assessment that included:

- A landscape analysis of existing youth services and City investments;
- Extensive community engagement via citywide surveys (2,000+ responses), focus groups, community forums, and interviews;
- GIS mapping of youth population characteristics and service coverage; and
- Identification of priority populations and unmet needs.

RDA engaged more than 3,000 stakeholders including youth, caregivers, community-based service providers, and City staff, and worked closely with a Community Advisory Committee and cross-departmental working group to ensure the plan reflected community priorities and operational realities. Engagement tools were designed to be linguistically and culturally responsive and were administered in multiple languages. The resulting [Children and Youth Services Master Plan](#) offered a shared vision and roadmap for coordinating services across City departments and external partners. It included:

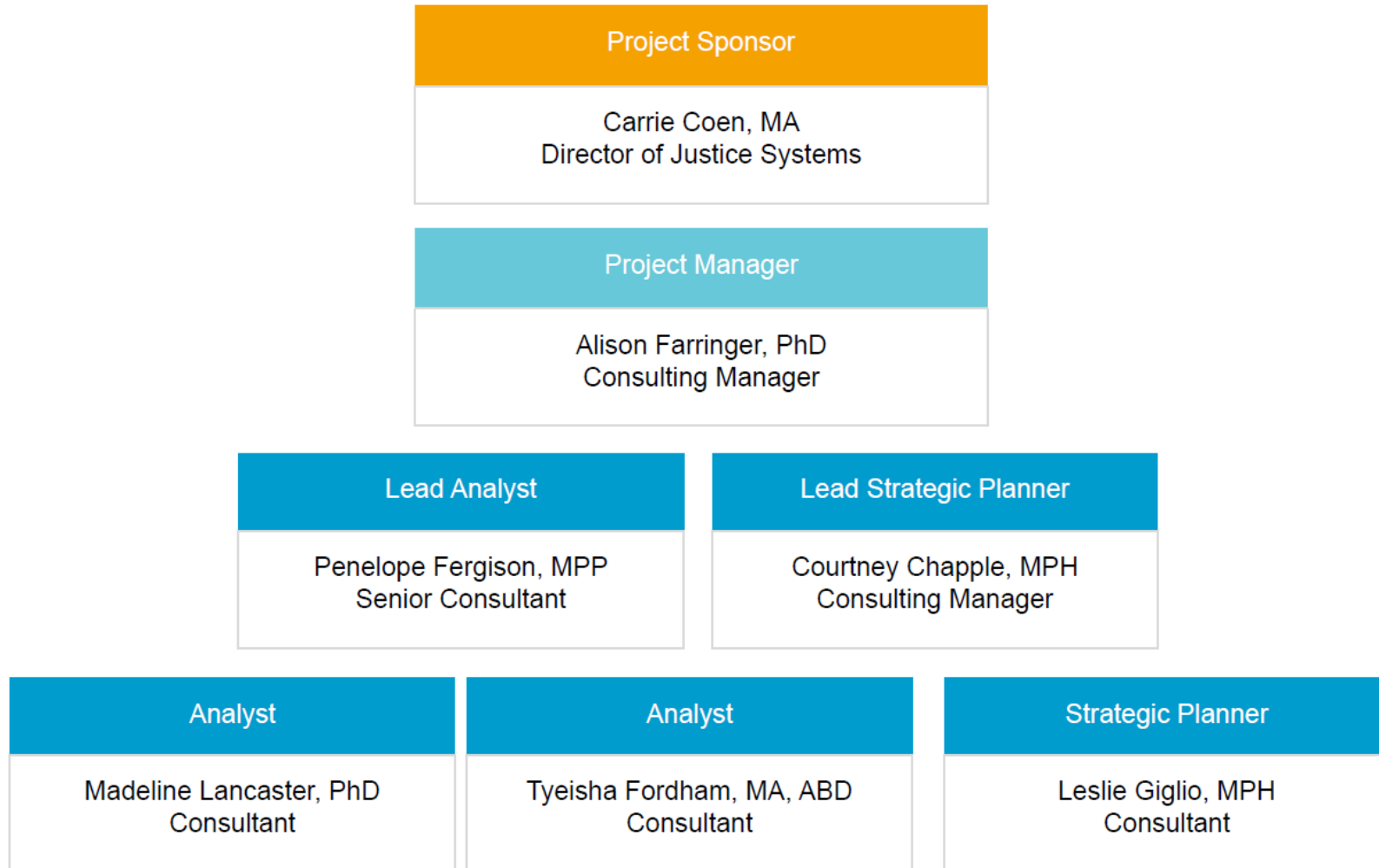
- A five-year implementation strategy;
- Recommended goals, performance metrics, and lead departments;
- Investment and funding strategies; and
- Communications materials to support implementation and accountability.

The CYSMP addressed several cross-cutting priorities including behavioral health supports, navigation and case management, youth employment, mentoring, violence prevention, and racial equity. RDA facilitated strategic planning sessions with City leadership to ensure that the plan aligned with ongoing City initiatives and was designed for sustainable implementation. This project demonstrates RDA’s ability to lead complex, multi-stakeholder planning processes with a strong foundation in research, community voice, and actionable outcomes. Our approach helped establish a coordinated, citywide framework for supporting youth development, building consensus, aligning investments, and improving access to services for children and youth across San José.

### 4.3.9. Team Qualifications

#### Project Team Organization Chart

The chart below illustrates the proposed RDA project team and their roles for any engagements resulting from this RFP. All key individuals named in this proposal are committed to performing the proposed work and will not be substituted or reassigned without prior approval from San Mateo County.



### Proposed Project Team Bios

The following section provides a summary of the experience and qualifications of RDA's proposed project team. Each team member brings relevant expertise in research and evaluation, strategic planning, and justice system initiatives, with direct experience supporting probation departments and other public sector clients across California. Together, the team offers a strong combination of subject matter knowledge, technical skills, and project management capacity to meet the requirements outlined in this RFP. Team members have been carefully selected based on their alignment with the project's scope and priorities and their ability to deliver high-quality work through a collaborative and equity-informed approach.

#### **Carrie Coen, MA, Director of Justice Systems – Project Sponsor (Lead Project Manager)**

Carrie Coen, a Director on the Executive Leadership team at RDA, has over 25 years of experience leading justice system initiatives across research, evaluation, strategic planning, and systems design. She brings deep expertise in adult and juvenile probation, reentry, diversion, and justice-mental health coordination. At RDA, Carrie serves as project sponsor and lead project manager on multi-year justice system evaluations and planning efforts, including facilitation of meetings, action planning, JJCC and CCP evaluation projects, and technical assistance to CBOs. Her work is grounded in implementation science and cross-system collaboration. Relevant recent projects include Contra Costa County Probation's JJCPA-YOBG TA, Los Angeles County DYD Evaluation, and AB 109 evaluation projects in Sonoma and Fresno Counties.

#### **Alison Farringer, PhD, Consulting Manager – Project Manager**

Dr. Alison Farringer is a seasoned evaluator with over 10 years of experience conducting mixed-methods evaluation and applied research in justice system settings. She brings particular expertise in behavioral health, corrections, and forensics. At RDA, Alison manages county and state-level evaluation projects focused on improving outcomes for justice-involved individuals, including qualitative and quantitative data collection, analysis, and reporting. Her prior academic research also focused on substance use and mental health treatment within correctional environments. She currently manages the Domestic Violence Co-Response Pilot Evaluation for San Mateo County, the City of San Jose's Youth Empowerment Alliance BEST program evaluation, and Prop 47 evaluations for Santa Clara County as well as other adult and juvenile justice initiatives.

#### **Courtney Chapple, MPH, Consulting Manager – Lead Strategic Planner**

Courtney Chapple is a public health planner and evaluator with expertise in cross-sector collaboration, strategic planning, and systems improvement. She has managed major planning and implementation initiatives across the public health and youth development sectors. At RDA, she leads strategic planning efforts with counties, cities, and CBOs, often guiding clients through participatory planning processes that incorporate data analysis, stakeholder engagement, and roadmap development. She served as project manager for the City of San José's Children and Youth Services Master Plan and supports justice-focused planning and evaluation efforts for probation and community safety programs in both Napa and Santa Barbara Counties.

#### **Penelope Ferguson, MPP, Senior Consultant – Lead Analyst**

Penelope Ferguson is an experienced mixed-methods researcher and data analyst. Her work spans planning, evaluation, and technical assistance in adult and juvenile justice, including pretrial, diversion, and reentry programs. She is highly skilled in outcome measurement, tool validation, dashboard design, and translating data into actionable recommendations. Penelope has led or

supported evaluation efforts for multiple counties including San Francisco, Santa Cruz, Sonoma, and Yolo. She currently leads quantitative analysis for Contra Costa Probation, including working with the department to build a Community Safety Index. She also served as lead analyst for the LA DYD Evaluation.

**Madeline Lancaster, PhD, Consultant – Analyst**

Dr. Madeline Lancaster recently earned her PhD in Criminal Justice from the University of Cincinnati, where she focused on corrections, behavioral health, and equity in court diversion programs. Her dissertation examined responses to persons in distress through an intersectional lens. Madeline has contributed to multiple research projects on specialty courts, pretrial systems, and mental health interventions. She brings strong applied research experience and subject matter expertise to RDA’s evaluation portfolio and is well-positioned to support data collection, analysis, and reporting on justice evaluation engagements.

**Tyeisha Fordham, MA, ABD, Consultant – Analyst**

Tyeisha Fordham is a quantitative and qualitative researcher with a background in justice, education, and social policy. Her work centers on elevating community and stakeholder voice through culturally responsive and equity-focused methods. She has supported interviews, focus groups, and analysis for a range of RDA evaluation engagements, including efforts related to justice system reform, community violence prevention, and youth development. Tyeisha contributes strengths in stakeholder engagement and participatory research and is a skilled analyst across a range of qualitative and quantitative methodologies.

**Leslie Giglio, MPH, Consultant – Strategic Planner**

Leslie Giglio brings training in public health and community systems planning. Her background includes work in program development, community needs assessment, and multi-agency coordination. At RDA, she supports strategic planning and evaluation initiatives across public sector clients, helping translate research into actionable strategies and effective public programming. Her MPH and experience in collaborative planning make her well-suited for supporting County-led efforts that bridge justice, behavioral health, and youth development systems.

**Project Team Resumes**

Brief resumes for each proposed team member are attached on the following pages.

### Carrie Coen, MA

Carrie Coen is an evidence-based practices expert with over 25 years of experience focused on both juvenile and adult correctional systems. She is a seasoned evaluator who focuses on helping agencies implement evidence-based practices in real-world settings. With a background in managing all sizes of mixed-methods evaluations, Carrie has expertise in research methods and design, as well as quantitative and qualitative data collection and analysis. She has also trained thousands of corrections professionals, practitioners, and academics across the United States and internationally.



### Education

**MA: Criminal Justice**, University of Massachusetts, Lowell, MA

### Skills

Project Management, Mixed-Methods Evaluation, Research Design, Quantitative and Qualitative Data Collection and Analysis, Training, and Technical Assistance

### Professional Experience

**RDA Consulting, 2021-Present: Director of Justice Systems**

**Proposed Project Sponsor:** The Project Sponsor provides high-level strategic oversight and guidance throughout the duration of the project. They serve as a senior advisor to both the project team and the client, ensuring that the work remains aligned with the client’s overarching goals, emerging needs, and strategic direction. The Project Sponsor contributes to key deliverables, helps troubleshoot complex challenges, and supports quality assurance efforts.

### Representative Projects

**Contra Costa County Probation Department Technical Assistance & Evaluation Services, 2021-Present**

Provide ongoing research, planning, and technical assistance to Contra Costa County Probation in support of its JJCPA and YOBS-funded juvenile justice programming. Includes facilitation of the Juvenile Justice Coordinating Council, capacity building for community-based providers, and analysis and reporting of program performance data to support compliance and continuous improvement. Advise the Department on broader system improvement efforts, including reentry, CalAIM implementation, and validation of risk and needs assessment tools.

*Role: Project Manager*

**Contra Costa Probation Department ORAS and OYAS IRR Study, 2023-2024**

Conduct an interrater reliability study for five different ORAS and OYAS tools, including collection and analysis of two types of data in preparation for a future validation study.

*Role: Project Sponsor*

**Fresno County Probation Department AB 109 Program Evaluation, 2024-Present**

Conduct process and outcome evaluations of AB 109-funded programs to understand the impact of specific programs on key outcomes and whether a program was implemented as intended. Provide data technical assistance to the Probation Department and AB 109 funded service providers to improve data reporting and ability to report on outcomes at a programmatic level.

*Role: Project Sponsor*

**San Jose Parks, Recreation and Neighborhood Services (PRNS) Mayor’s Gang Prevention Task Force (MGPTF) Bringing Everyone’s Strengths Together (BEST) Program Evaluation, 2022-Present**

Conduct a mixed methods evaluation including an implementation and outcome study of the City's BEST program which funds qualified nonprofit service providers across five eligible service areas supporting community-based programs that serve youth and young adults, striving to build on youth strengths and reduce their risk for involvement in gangs and violence.

*Role: Project Sponsor*

**San Jose Office of the City Manager, Children and Youth Services Master Plan (CYSMP), 2022-2024**

Supported the development of the CYSMP to serve as both the City’s public policy document on children and youth and assist the City Manager’s Office in planning project work for the upcoming years, including collaboration, interviews, and focus groups with the Office, an Executive Committee, and a Community Advisory Board to identify needs and priorities being addressed through the plan.

*Role: Project Sponsor*

**Yolo County Probation Department Juvenile Assessment Tool Validation, 2022-2023**

Completed a validation of the Probation Department’s Ohio Youth Assessment System’s Detention Tool, Diversion Tool, and Disposition Tool with a focus on identifying any detectable biases based on gender, income, race, or ethnicity in probation-involved youth decision-making.

*Role: Project Sponsor*

**Yolo County Probation Department Pretrial Risk Assessment Tool Validation, 2023-2024**

Performed analysis and produced a validation report on data collected from the Department's Pretrial Supervision Services' use of the ORAS Pretrial Assessment Tool.

*Role: Project Sponsor*

**Other Professional Experience**

**University of Cincinnati Corrections Institute, Cincinnati, OH**

**Senior Research Associate (2013-2021), Research Associate (2009-2013)**

- Worked closely with clients throughout the fact-finding phases and established strong communication protocols and processes between all stakeholders, including state, federal, county, and local partners.
- Responsible for managing numerous federal, state, county, and city evaluation projects, including a multi-state examination of the implementation of juvenile risk and needs assessment, an evaluation of Ohio’s Prison Programs, and agency-specific assessments of their ability to reduce recidivism. Use SPSS for data collection and analysis.
- Created training materials and manuals including training documentation and user guides and built out enhanced processes from ground-up to ensure robust training materials for multiple offerings.
- Conducted over 300+ training events including many in state and local probation and parole agencies.
- Project Director for the Evidence-Based Correctional Program Checklist and its variations.
- Served as the principal investigator for over 30 projects and was responsible for fiscal and personnel management.
- Served as a peer reviewer for federal solicitations and various monographs.

### Alison J. Farringer, PhD

Alison Farringer is a skilled researcher with over ten years of experience providing a myriad of evaluation, research, and technical assistance services supporting behavioral health and corrections-related projects and initiatives at the local, state, and federal levels. Prior to joining RDA, Dr. Farringer worked in the areas of criminal justice, corrections, behavioral health, forensic psychology, and pediatric health. In particular, she worked as a researcher, practitioner, and evaluator in a variety of clinical and correctional contexts, including court-ordered residential and outpatient drug treatment programs and halfway houses, as well as children's and forensic psychiatric hospitals.



### Education

**PhD: Criminal Justice**, University of Cincinnati, Cincinnati, OH

**MA: Forensic Psychology**, Fairleigh Dickinson University, Teaneck, NJ

**BS: Psychology & Criminal Justice**, University of Cincinnati, Cincinnati, OH

### Skills

Project Management, Mixed-Methods Evaluation, Training, Technical Support, Data Collection & Analysis

### Professional Experience

**RDA Consulting, 2022-Present: Consulting Manager**

**Proposed Project Manager:** Serves as the primary point of client contact, responsible for all project management activities, including client communications, internal team management, overseeing project deliverables, and ensuring on-time and within-budget project completion.

### Representative Projects

**California Board of State & Community Corrections, California Violence Intervention and Prevention (CalVIP) Cohort 5 Grantee Capacity Building, 2025-Present**

Provide capacity building services to CalVIP Cohort 5 grantees to strengthen their performance in key evaluation areas, including data collection.

*Role: Technical Support*

**Daly City Police Department, Board of State and Community Corrections (BSCC)**

**Organized Retail Theft Evaluation, 2024-Present**

On behalf of the Cities of Daly City, San Bruno, and San Mateo, evaluate the implementation of the Organized Retail Theft Prevention Grant awarded by BSCC.

*Role: Analyst*

**San José Parks, Recreation & Neighborhood Services, San Jose Youth Empowerment Alliance Bringing Everyone's Strengths Together (BEST) Program Evaluation, 2022-Present**

Conduct a mixed methods evaluation including an implementation and outcome study of the City's BEST program which funds qualified nonprofit service providers across five eligible service areas supporting community-based programs that serve youth and young adults, striving to build on youth strengths and reduce their risk for involvement in gangs and violence.

*Role: Project Manager*

**San Mateo County Behavioral Health & Recovery Services, MHSA INN Mobile Behavioral Health Services for Farmworkers Evaluation, 2023-Present**

Conduct a multi-year collaborative, mixed-methods process and outcome evaluation of the Mobile BHS for Farmworkers program to examine program implementation processes and client outcomes, support continuous program improvement efforts, fulfill MHSA INN reporting requirements, and produce annual evaluations as well as a final evaluation report.

*Role: Project Manager*

**San Mateo County Behavioral Health Services, Department, MHSA INN Pacific Islanders Organizing, Nurturing, and Empowering Everyone (PIONEERS) Program Evaluation, 2023-2024**

Conduct a multi-year collaborative, mixed-methods process and outcome evaluation of the PIONEERS program to inform continuous service improvement, examine the learning objectives outlined in the INN project, and fulfill required INN reporting requirements, and produce annual evaluations as well as a final evaluation.

*Role: Project Manager*

**Santa Clara County Behavioral Health Services Department, Prop 47 III Evaluation, 2022-Present**

Conduct a mixed-methods process and outcome evaluation to assess the impact and effectiveness of the Proposition 47 programs relating to mental health treatment, substance abuse treatment, housing, and employment for justice-system involved individuals with persistent mental illness and co-occurring disorders.

*Role: Project Manager*

**Sonoma County Public Defender's Office, Holistic Defense Unit, Justice Assistance Grant (JAG) Program Evaluation, 2025-Present**

Conduct an evaluation of the Edward Byrne Memorial Justice Assistance Grant (JAG)-funded programs (DMV, Mental Health Diversion) to assess the the implementation, outcomes, and impact. Tasks include quantitative data collection and analysis, and developing a Local Evaluation Report to comply with Board of Community and Corrections regulations.

*Role: Project Sponsor*

**Other Professional Experience**

**The Council of State Governments (CSG) Justice Center, New York, New York**

**Senior Policy Analyst, April 2021-May 2022**

- Managed a portfolio of 20+ grantees under multiple Department of Justice Second Chance Act grant tracks, including awards focused on improving correctional reentry for people with substance use and cooccurring disorders, as well as Pay for Success Outcomes-Based Contracting grants.
- Provided technical assistance (TA) to grantees in focus areas such as screening and assessment, evidence-based programming, data collection, and program evaluation, and assisted grantees with completion of grant-required deliverables, goals and action plans, data reporting, and final reports.
- Coordinated and led monthly TA calls, peer connection calls, and virtual site visits to assist grantees with meeting their program planning, implementation, and evaluation goals.
- Led project management and writing for DOJ-funded projects, including focus groups on healthcare coverage in corrections, planning exercises for outcomes-based contracting grantees, and webinars on evidence-based case management and reentry planning.

### Penelope Ferguson, MPP

Penelope Ferguson is a skilled mixed-methods analyst with deep experience supporting justice system evaluation and planning efforts. At RDA, she serves as a lead analyst on multi-year initiatives with probation departments, diversion programs, and community-based providers. Penelope brings particular expertise in quantitative analysis, performance measurement, and data visualization, translating complex datasets into actionable insights for both agency leadership and frontline practitioners. Her background includes managing and analyzing program data for large-scale public health and workforce initiatives in Los Angeles County, as well as developing spatial tools to guide equity-focused policy decisions.



### Education

**MPP: Public Policy**, University of Southern California, Los Angeles

**BA: History of Public Policy and Political Science**, University of California, Santa Barbara,

### Skills

Data Collection and Advanced Analysis, Mixed-Methods Evaluation, Tool Validation

### Professional Experience

#### **RDA Consulting, 2021-Present: Senior Consultant**

**Proposed Lead Analyst:** The lead analyst will oversee the collection, analysis, and interpretation of quantitative data across service areas, working closely with County staff and program partners to ensure findings are accurate, timely, and useful. She will develop performance metrics, design data collection tools, and produce accessible reporting products, such as visual summaries, charts, and other materials, to support informed decision-making, facilitate cross-system learning, and promote continuous quality improvement.

#### Representative Projects

#### **Contra Costa County Probation Department, Technical Assistance & Evaluation Services, 2021-Present**

Provide ongoing research, planning, and technical assistance to Contra Costa County Probation in support of its JJCPA and YOBG-funded juvenile justice programming. This includes facilitation of the Juvenile Justice Coordinating Council, capacity building for community-based providers, and analysis and reporting of program performance data to support compliance and continuous improvement. Advise the Department on broader system improvement efforts, including reentry, CalAIM implementation, and validation of risk and needs assessment tools.

*Role: Quantitative Analyst*

#### **Contra Costa County Probation Department, Ohio Risk Assessment System (ORAS) and Ohio Youth Assessment System (OYAS) Interrater Reliability (IRR) Study, 2023-2024**

Conduct an interrater reliability study for five different ORAS and OYAS tools, including collection and analysis of two types of data in preparation for a future validation study.

*Role: Project Manager & Quantitative Analyst*

#### **Los Angeles County, Department of Youth Development, 2022-2024**

Conducted a comprehensive process and outcome evaluation of Youth Diversion and Youth Development services, which seek to reduce further justice system involvement for youth in the County while improving academic, health, social, and economic outcomes for the participants.

*Role: Lead Quantitative Analyst*

**San Francisco Pretrial Diversion Project (PDP), California Community Reinvestment Grants Program (CalCRG) Evaluation, 2022-2024**

Conducted a mixed-methods evaluation, including planning and three rounds of qualitative and data collection, analysis and memo development, to assess the effectiveness and impact of SF PDP's CalCRG funded services.

*Role: Project Manager & Analyst*

**San José Parks, Recreation & Neighborhood Services, San Jose Youth Empowerment Alliance Bringing Everyone's Strengths Together (BEST) Program Evaluation, 2022-Present**

Conduct a mixed methods evaluation including an implementation and outcome study of the City's BEST program which funds qualified nonprofit service providers across five eligible service areas supporting community-based programs that serve youth and young adults striving to build on youth strengths and reduce their risk for involvement in gangs and violence.

*Role: Lead Analyst*

**Sonoma County Probation Department, Justice and Mental Health Collaboration Program Evaluation, 2021-2022**

Conducted a multidisciplinary team evaluation of Sonoma County's collaborative program to provide mental health treatment and case management to individuals being held pre-trial. Provided technical assistance throughout data collection, analysis, and reporting periods.

*Role: Lead Quantitative Analyst*

**Santa Barbara County Probation Department, Adult Diversion Process Evaluation, 2024-2025**

Conducted a Diversion Process Evaluation to assess the process and implementation of several diversion programs offered in Santa Barbara County.

*Role: Lead Analyst*

**Yolo County Probation Department, Juvenile Assessment Tool Validation, 2022-2023**

Completed a validation of the Probation Department's Ohio Youth Assessment System's Detention Tool, Diversion Tool, and Disposition Tool with a focus on identifying any detectable biases based on gender, income level, race, or ethnicity in probation-involved youth decision-making.

*Role: Project Manager & Quantitative Analyst*

**Other Professional Experience**

**Los Angeles Mayor's Office – Master's Final Project Los Angeles, CA**

**Team Project Manager & Client Liaison August 2020 – May 2021**

- Worked with the LA Mayor's Office to define the scope and deliverables for our consulting project, identifying where the city's more digitally vulnerable residents live and proposing policy interventions. Clearly communicated timelines for deliverables with our client and managed team progress on assigned tasks.
- Conducted a systematic review of existing literature to determine the factors contributing to the digital divide and built a social vulnerability index from Census, CPUC broadband, and labor analytics databases.
- Mapped this equity index and utilized spatial statistics to identify areas with acute digital literacy needs, communicated with interactive digital vulnerability maps exploring the factors driving the digital divide.

### Courtney Chapple, MPH

Courtney Chapple is an experienced public health leader, strategist, and community health planner with over 14 years of experience supporting both state and local health departments. At RDA, Courtney supports projects that advance community health and wellbeing to promote equitable access to services. Prior to RDA, she held leadership roles in public health at the county and state levels, including Deputy Health Officer, Emergency Preparedness Coordinator, and Public Information Officer for a county health department, and Pandemic Response Director for a state health department with the CDC Foundation during the COVID-19 pandemic.



### Education

**J.D. Candidate, Health Law**, Mitchell Hamline School of Law, St. Paul, MN (2027)

**MPH: Public Health, Health Management & Policy**, University of Michigan, Ann Arbor, MI

**BA: Social Theory and Practice**, University of Michigan, Ann Arbor, MI

### Skills

Program Evaluation, Strategic Planning, Community Engagement, Training, Facilitation

### Professional Experience

**RDA Consulting, 2023-Present: Consulting Manager**

**Proposed Lead Strategic Planner:** Designs and guides strategic planning processes that engage stakeholders, align with system priorities, and support data-informed decision-making. Leads the development of planning tools, implementation roadmaps, and actionable strategies that reflect community input, system needs, and policy goals. Coordinates stakeholder engagement and facilitation efforts to build consensus, ensure cross-sector alignment, and develop durable plans that advance equity and improve outcomes.

### Representative Projects

**Berkeley Mental Health Division (MHD), Results-Based Accountability (RBA) Evaluation & Technical Assistance, 2024**

Trained MHD staff on the RBA framework; supported staff in establishing and collecting RBA performance measures to evaluate outcomes for all internal mental health programs.

*Role: Project Sponsor*

**Contra Costa Health (CCH), CalAIM Equity Plan & Capacity Assessment, 2024-Present**

Support the CCH in developing and conducting an equity assessment to inform future equity analyses of health services within the framework of the CalAIM Justice Involved Initiative (CalAIM JII). This effort aims to ensure that health services provided under the initiative are equitable and responsive to the needs of justice-involved populations.

*Role: Project Sponsor*

**Napa County Probation Community Corrections Partnership Strategic & Annual Plan Update, 2025**

Develop the Napa County Probation Department's Fiscal Year 2025-2026 Annual Public Safety Realignment Plan as a requirement to receiving State funding under AB 109 (Public Safety Realignment Act of 2011).

*Role: Project Manager*

**Lake County Behavioral Health Services, Mental Health Services Act Annual Updates and Three-Year Plan Development, 2023-Present**

Provide technical assistance and support in the Community Program Planning (CPP) process and support the MHSa Program and Expenditure Annual Updates and Three-year plan.

*Role: Project Manager & Project Sponsor*

**San Jose Parks, Recreation and Neighborhood Services (PRNS), Children and Youth Services Master Plan (CYSMP), 2023-2024**

Supported the development of the CYSMP to serve as both the City's public policy document on children and youth and assist the Office of the City Manager (OCM) in planning project work for the upcoming years, including collaboration, interviews, and focus groups with OCM, an Executive Committee, and a Community Advisory Board to identify needs and priorities to be addressed through the plan.

*Role: Project Manager*

**Santa Barbara County Probation Department, Community Corrections Partnership Strategic Plan & TA, 2025-Present**

Develop a County of Santa Barbara Diversion Strategic Plan building on the recommendations RDA identified in the June 2025 published process and implementation report on diversion programs offered in the County.

*Role: Strategic Planner*

**Santa Cruz County Behavioral Health Division, MHSa Community Engagement Three-Year Plan, 2023**

Developed and supported completion of a three-year integrated plan and the 2023-24 Annual Update in alignment with MHSa requirements and execution of a community planning process that fosters broad community member and partner engagement with priority focus on elevating the voices of community members most impacted by service provision and planning decisions.

*Role: Project Manager*

**Yolo County Health and Human Services Agency, Community Health Assessment (CHA) and Community Health Improvement Plan (CHIP), 2023**

Supported the County in finalizing their CHA report and developed a three-year CHIP that outlines community priorities and plans of action to achieve objectives related to priority health issues identified in the CHA and collaborate with HHSa to implement the process.

*Role: Project Manager*

**Other Professional Experience**

**Region IV Area Agency on Aging, St. Joseph, MI**

**Community Services Director, April 2022 to January 2023**

- Responsible for community planning, needs analysis, service development, and public policy efforts to advance and expand service capability of the agency to identify and fill community needs and convene aging network partners and community members.
- Coordinated communication campaigns and social media strategy for the AAA as well as aging network partners.
- Coordinated and developed service and administrative programming as well as administrative operations in conjunction with other members of the Management Team.
- Developed and managed metrics across community service programs and initiatives to assure planned impact and advance quality.

### Madeline Lancaster, PhD

Dr. Madeline Lancaster is an experienced researcher and evaluator with six years of applied experience in criminal justice, behavioral health, and diversion systems. Her work has supported multidisciplinary teams examining specialty courts, pretrial interventions, and community-based alternatives to incarceration. Dr. Lancaster brings strong qualitative and quantitative research skills, as well as subject matter expertise in corrections, community supervision, and justice system reform.



### Education

**PhD: Criminal Justice**, University of Cincinnati, Cincinnati, OH

### Skills

Mixed-Methods Evaluation, Policy Analysis, Qualitative Analysis, Qualitative & Quantitative Research, Data Analysis,

### Professional Experience

**RDA Consulting, 2025-Present: Consultant**

**Proposed Analyst:** Supports the design and execution of research and evaluation activities, including developing data collection tools, conducting analysis, and preparing deliverables. Ensures methodological rigor, clarity of findings, and alignment with project goals.

### Representative Projects

**California Board of State & Community Corrections California Violence Intervention and Prevention (CalVIP) Cohort 5 Grantee Capacity Building, 2025-Present**

Provide capacity building services to CalVIP Cohort 5 grantees to strengthen their performance in key evaluation areas, including data collection.

*Role: Technical Assistance Provider*

**Contra Costa County Probation Department Technical Assistance & Evaluation Services, 2025-Present**

Provide ongoing research, planning, and technical assistance to Contra Costa County Probation in support of its JJCPA and YOBG-funded juvenile justice programming. Includes facilitation of the Juvenile Justice Coordinating Council, capacity building for community-based providers, and analysis and reporting of program performance data to support compliance and continuous improvement. Advise the Department on broader system improvement efforts, including reentry, CalAIM implementation, and validation of risk and needs assessment tools.

*Role: Analyst, Technical Support*

**Contra Costa County Probation Department, OYAS ORAS Validation Study, 2025-Present**

Conduct a comprehensive validation study on the risk and needs assessments tools used—the Ohio Risk Assessment System (ORAS) and the Ohio Youth Assessment System (OYAS).

*Role: Analyst*

**Marin County Behavioral Health and Recovery Services, Prop 47 Cohort III Evaluation, 2025-Present**

Conduct a mixed-methods evaluation of Prop 47, including revisions to the Local Evaluation Plan, program discovery and learning activities, establishing a quarterly reporting framework, client interviews, presentations to County, and facilitating quarterly meetings with a Local Advisory Committee.

*Role: Analyst*

**Fresno County Probation Department, AB 109 Program Evaluation, 2025-Present**

Conduct process and outcome evaluations of AB 109-funded programs to understand the impact of specific programs on key outcomes and whether a program was implemented as intended.

RDA also provides data technical assistance to the Probation Department and service providers to improve data reporting and the ability to report on outcomes at a programmatic level.

*Role: Analyst*

**Fresno County Probation Department, Justice Assistance Grant Local Evaluation Plan & Report, 2025-Present**

Conduct a comprehensive three-year evaluation of the Department's Adult Reentry Planning Program (ARPP), funded by the Edward Byrne Memorial Justice Assistance Grant (JAG) and administered by the Board of State and Community Corrections. Develop the Local Evaluation Plan to drive the assessment of the program's effectiveness in supporting individuals re-entering their communities. Utilizing a continuous quality improvement approach, the evaluation will also identify opportunities for enhancements by both service providers and the Department.

*Role: Analyst*

**Interfaith Shelter Network Adult Reentry Evaluation, 2025-Present**

Develop a Local Evaluation Plan and conduct a multi-year process and outcome evaluation of the Adult Reentry Grant (ARG) Rental Assistance Program including all evaluation reports required by the Board of State and Community Corrections.

*Role: Consultant*

**Solano County Superior Court, Veterans Treatment Court Evaluation, 2025-Present**

Provide evaluation services for the federally funded treatment court and conduct data collection, analysis, and results interpretation.

*Role: Analyst*

**Sonoma County Department of Health Services, Prop 47 III Evaluation, 2025-Present**

Provide evaluation services for the Board of State and Community Corrections grant funded Prop 47 Cohort III Jail In-Reach Program. Conduct data collection, analysis, and results interpretation, and produce two annual infographics and a Final Local Evaluation Report that will comply with the BSCC requirements.

*Role: Analyst*

**Sonoma County Public Defender's Office, Holistic Defense Unit, Justice Assistance Grant Program Evaluation, 2025-Present**

Conduct an evaluation of the Edward Byrne Memorial Justice Assistance Grant (JAG)-funded programs (DMV, Mental Health Diversion) to assess the the implementation, outcomes, and impact. Includes quantitative data collection and analysis, and developing a Local Evaluation Report to comply with Board of Community and Corrections regulations.

*Role: Analyst*

**Other Professional Experience**

**University of Cincinnati, School of Criminal Justice, Cincinnati, OH**

**Research Assistant, 2018-2025**

- Designed and administered surveys and interviews
- Conducted quantitative and qualitative data analysis
- Managed research data and coordinated project teams
- Performed in-depth literature reviews
- Co-authored reports and academic publications

### Tyeisha Fordham, MA

Tyeisha Fordham is a criminal justice researcher and educator with expertise in qualitative and quantitative analysis, reentry program development, and addressing systemic inequities in the juvenile justice system. Currently pursuing her Ph.D. in Criminal Justice at Indiana University, she has conducted extensive research, including a national analysis of prosecutors and interviews with previously incarcerated juveniles. As a former HOPE Statewide Juvenile Mentoring Re-entry Liaison for the Indiana Department of Corrections, she helped prepare incarcerated youth for successful reentry.



### Education

**PhD (Candidate): Criminal Justice**, Indiana University, Bloomington, IN

**MA: Criminal Justice**, Indiana University, Bloomington, IN

**BA: Criminal Justice & Psychology**, Indiana University, Bloomington, IN

### Skills

Mixed-Methods Evaluation, Data Collection & Analysis, Technical Support

### Professional Experience

**RDA Consulting, 2024-Present: Consultant**

**Proposed Analyst:** Supports the design and execution of research and evaluation activities, including developing data collection tools, conducting analysis, and preparing deliverables. Ensures methodological rigor, clarity of findings, and alignment with project goals.

### Representative Projects

**Contra Costa County Probation Department, Technical Assistance & Evaluation Services, 2024-Present**

Provide ongoing research, planning, and technical assistance to Contra Costa County Probation in support of its JJCPA and YOBG-funded juvenile justice programming. Includes facilitation of the Juvenile Justice Coordinating Council, capacity building for community-based providers, and analysis and reporting of program performance data to support compliance and continuous improvement. Advise the Department on broader system improvement efforts, including reentry, CalAIM implementation, and validation of risk and needs assessment tools.

*Role: Quantitative Data Analyst*

**Contra Costa County Probation Department, OYAS ORAS Validation Study, 2024-Present**

Conduct a comprehensive validation study on the risk and needs assessments tools used—the Ohio Risk Assessment System (ORAS) and the Ohio Youth Assessment System (OYAS).

*Role: Analyst*

**Fresno County Probation Department Justice Assistance Grant Local Evaluation Plan and Report, 2024-Present**

Conduct a comprehensive three-year evaluation of the Department's Adult Reentry Planning Program (ARPP), funded by the Edward Byrne Memorial Justice Assistance Grant and administered by the Board of State and Community Corrections. Develop the Local Evaluation Plan to drive the assessment of the program's effectiveness in supporting individuals re-entering their communities. Utilizing a continuous quality improvement approach, the evaluation will also identify opportunities for enhancements by both service providers and the Department.

*Role: Quantitative & Qualitative Data Analyst*

**Fresno County Probation Department, AB 109 Program Evaluation, 2024-Present**

Conduct process and outcome evaluations of AB 109-funded programs to understand the impact of specific programs on key outcomes and whether a program was implemented as intended. RDA also provides data technical assistance to the Probation Department and AB 109 funded service providers to improve data reporting and the ability to report on outcomes at a programmatic level.

*Role: Quantitative & Qualitative Data Analyst*

**Santa Clara County Behavioral Health Services Department Prop 47 III Evaluation, 2024-Present**

Conduct a mixed-methods process and outcome evaluation to assess the impact and effectiveness of the Prop 47 program relating to mental health treatment, substance abuse treatment, housing, and employment for justice-system involved individuals with persistent mental illness and co-occurring disorders.

*Role: Quantitative & Qualitative Data Analyst*

**San José Parks, Recreation & Neighborhood Services, San Jose Youth Empowerment Alliance Bringing Everyone's Strengths Together (BEST) Program Evaluation, 2025-Present**

Conduct a mixed methods evaluation including an implementation and outcome study of the City's BEST program which funds qualified nonprofit service providers across five eligible service areas supporting community-based programs that serve youth and young adults, striving to build on youth strengths and reduce their risk for involvement in gangs and violence.

*Role: Analyst*

**Sonoma County Probation, Juvenile Secure Youth Treatment Facility (SYTF) Process & Youth Voice Reentry Evaluation, 2025-Present**

Conduct a process evaluation of Sonoma County's SYTF and less restrictive step-down programs to assess implementation and stakeholder experiences, providing actionable insights to enhance youth rehabilitation and reentry through trauma-informed and culturally responsive practices.

*Role: Quantitative & Qualitative Data Analyst*

**Santa Cruz County Juvenile Probation Department, Stable Transitions After Reentry (STAR) Evaluation, 2024-Present**

Conducted a three-year evaluation of a newly established BSCC-funded STAR project to improve the reentry process for youth exiting juvenile hall.

*Role: Analyst*

**Other Professional Experience**

**Indiana University**

**Research Assistant (2016-2023)**

- Collected and analyzed qualitative data detailing demographics and campaign features of all prosecutors in the United States across 3,143 counties.
- Conducted interviews with previously incarcerated juveniles regarding employment and education skills, experiences while incarcerated, and opinions surrounding reentry.

**Indiana Department of Corrections**

**HOPE Statewide Juvenile Mentoring Re-entry Liaison, 2019-2022**

Aided a small team in organizing, coordinating, and monitoring a mentor program that provides incarcerated youth with resources to prepare for reentry.

### Leslie Giglio, MPH

Leslie Giglio is a public health consultant with a strong background in qualitative research, strategic planning, and community-centered systems change. She has eight years of experience advancing equity across behavioral health, justice, and human service systems. At RDA, she supports planning and evaluation projects that center stakeholder engagement, particularly among underserved and immigrant communities. Leslie has designed and facilitated focus groups, managed advisory bodies, and contributed to bilingual materials and culturally responsive strategies to improve service coordination.



### Education

**MPH: Community Health Sciences, University of California, Berkeley, CA**

**BS: Public Health, Spanish, Santa Clara University, Santa Clara, CA**

### Skills

Program Evaluation, Data Analysis, Strategic Planning, Community Engagement, Training

### Professional Experience

#### **RDA Consulting, 2025-Present: Consultant**

**Proposed Strategic Planner:** Supports strategic planning processes that engage stakeholders, align with system priorities, and support data-informed decision-making. Leads the development of planning tools, implementation roadmaps, and actionable strategies that reflect community input, system needs, and policy goals. Coordinates stakeholder engagement and facilitation efforts to build consensus, ensure cross-sector alignment, and develop durable plans that advance equity and improve outcomes.

#### Representative Projects

#### **Santa Barbara County Probation Department, Community Corrections Partnership Strategic Plan & TA, 2025-Present**

Develop a County of Santa Barbara Diversion Strategic Plan building on the recommendations RDA identified in the June 2025 published process and implementation report on diversion programs offered in the County.

*Role: Strategic Planner*

#### **Sonoma County Department of Health Services, Stepping Up Workgroup Coordination & Facilitation, 2025-Present**

Provide equity-focused planning and facilitation for the Stepping Up Workgroup, which includes representatives from County departments and community partners. This effort supports improvement and innovation initiatives within the criminal justice and behavioral health systems of care, with a strong emphasis on collaboration and inclusivity to ensure equity remains central to all activities.

*Role: Facilitator, Planner*

#### **American Institutes for Research, Oakland Children's Initiative Evaluation, 2025-Present**

Conduct the inaugural evaluation of the Oakland Children's Initiative including the development and implementation of a two-year evaluation with the primary focus of assessing the collective impact of the Initiative and the overall delivery of services provided by the Implementation Partners, and encompassing strategies, sub-strategies, and activities aimed at improving access

and enhancing the quality of early care and education, as well as college access supports.

*Role: Facilitator*

**Contra Costa County Health, CalAIM Equity Capacity Assessment, 2025-Present**

Support Contra Costa Health in developing and conducting an equity assessment designed to inform future equity analysis of health services within the framework of the CalAIM Justice Involved Initiative (CalAIM JII). This work aims to ensure that health services provided under the initiative are equitable and responsive to the needs of justice-involved populations.

*Role: Consultant*

**San Mateo County Health Aging & Disability Services, Community Enrichment Planning & Facilitation, 2025-Present**

Conduct a needs assessment and design a plan to advance programs and activities that increase social connectedness and wellness for older adults and adults with disabilities in the County.

*Role: Facilitator, Planner*

**San Mateo County Behavioral Health and Recovery Services, Mental Health Services Act (MHSA) Innovation (INN) Kapwa Kultural Center and Cafe Evaluation, 2025-Present**

Conduct a comprehensive evaluation of the Kapwa Kultural Center and Café implementation to examine the learning objectives for this project and produce annual and final evaluation reports for submission to BHRS and the MHOAC.

*Role: Consultant*

**San Mateo County Behavioral Health and Recovery Services, MHSA INN Farmworker Equity Express Program Evaluation, 2025-Present**

Conduct a multi-year collaborative, mixed-methods process and outcome evaluation of the Farmworker Equity Express program (previously Mobile Behavioral Health Services for Farmworkers) to examine program implementation processes and client outcomes; support continuous program improvement efforts; fulfill MHSA INN reporting requirements; and produce annual evaluations as well as a final evaluation report.

*Role: Consultant*

**Other Professional Experience**

**Ad Lucem Consulting, San Francisco, CA**

**Public Health Consultant, 2024-2025**

- Lead project manager, establishing CBO partnerships, managing work plan timelines, and community focus groups, to inform home and community-based service policy improvement at CA Department of Aging.
- Convened racially and geographically diverse Community Advisory Group, elevating community expertise and input towards equitable dementia care delivery improvement across Los Angeles County.

**NYU McSilver Institute for Poverty and Research**

**Program Associate, 2023-2025**

- Oversight of Technical Assistance Center, managing and designing in-person, online webinars, events and educational resources to ensure core-competencies for 14,000 NY State mental health practitioners.
- Initiated culturally responsive working groups, developed community curricula, identified strategic needs and priorities for integrating anti-oppressive praxis to advance mental health equity.

#### 4.3.10. References

##### Contra Costa County Probation Department

**Contact Person:** Esa Ehmen-Krause, Chief Probation Officer

**Address:** 50 Douglas Drive Suite 201, Martinez, CA 94553

**Telephone Number:** (925) 313-4188

**Email:** esa.ehmen@prob.cccounty.us

RDA has partnered with Contra Costa County Probation since 2019 to provide a wide range of technical assistance and evaluation services that strengthen the Department's use of data and evidence-based services. Our work with the Department includes providing comprehensive technical assistance, including support for the JJCPA and YOBG Consolidated Annual Plan updates, facilitation of the JJCC and subcommittee meetings, strategy development for California Advancing and Innovating Medi-Cal (CalAIM), and capacity building for CBOs; assisting with case management system implementation, coaching for the Public Defender's Youth Early Intervention Program (YEIP) pilot, and supporting the Department's Transitional Age Youth (TAY) Service Network. We also ensure procurement and compliance through Requests for Proposals (RFPs) and contract monitoring assistance, while also guiding continuous quality improvement (CQI) efforts and delivering targeted training for probation officers, staff, and treatment providers. Additional details are provided in section 4.3.8. Firm Qualifications.

##### Los Angeles County Department of Youth Development

**Contact Person:** Sahar Moheize, Research, Policy, and Innovation Program Director

**Address:** 320 W. Temple St., 7th Floor, Los Angeles, CA 90012

**Telephone Number:** (213) 584-4307

**Email:** smoheize@dyd.lacounty.gov

From 2021 to 2024, RDA conducted a multi-year process and outcome evaluation of Los Angeles County's youth diversion programming administered by the Department of Youth Development. The work included performance measurement development, cost-benefit and equity analyses, and extensive stakeholder engagement, including youth-led focus groups through a Participatory Action Research (PAR) model. Evaluation findings informed strategic planning, supported funding sustainability, and advanced service equity. Additional details are provided in section 4.3.8. Firm Qualifications.

### 4.3.11. Fee Proposal

RDA proposes the following budgets for the full project term of January 1, 2026, through December 30, 2030. These budgets cover all direct and indirect costs necessary to deliver the services described in the scope of work, including travel for in-person meetings and presentations, translation, in-person meeting materials, and participant incentives.

- Juvenile Services: \$1,413,685 (2026-2030)
- Adult and Pretrial Services: \$639,901 (2026-2030)

**Please note the following:**

- An estimated amount of **\$375,000** (\$75,000 per year) has been included in the **Adult and Pretrial Services** budget as a placeholder for anticipated project activities. If this amount is not aligned with the Probation Department’s thinking, RDA is able to adjust accordingly.
- To comply with the RFP’s Questions and Answers, RDA has split the **Evaluation of Existing Resources (Task 2.3)** into separate activities for **Juvenile Services** and **Adult and Pretrial Services**. Should the Department wish to approach this task as a combined effort, RDA can reduce the overall budgets for each service area by 25%.

The hours proposed for staff on each task are estimates and may be adjusted during the project, however RDA will not exceed the total budget amount in the contract. RDA invoices monthly for all project activities completed up to the agreed not-to-exceed budget total.

A list of all RDA staff positions and their fully loaded hourly rates across the five-year project term are below in the event they are called upon to contribute to the project. These rates are inclusive of all personnel, fringe benefit, materials, equipment, insurance, communications, indirect, facilities, and administrative costs that will be incurred over the course of the proposed project.

Position	Hourly Rate
Chief Executive Officer	\$325
Chief Operating Officer	\$300
Director	\$270
Consulting Manager	\$250
Senior Consultant	\$225
Consultant	\$195
Associate	\$150
Consulting Assistant	\$130

### Budget Detail Snapshots

The following pages provide detailed budget snapshots for each year of the Juvenile Services scope of work (five separate annual budgets) and a combined five-year budget for Adult & Pretrial Services. These snapshots illustrate the allocation of resources across tasks and the inclusion of all direct expense items noted above.

San Mateo County Probation Department  
RFP No. 2025-RFP-00559: Research and Evaluation Services

Proposed Budget: Juvenile Services (Year 1 – 2026)

Juvenile Services Tasks (2026)	Director (Project Sponsor) (\$270/hr)	Consulting Manager (Project Manager) (\$250/hr)	Consulting Manager (Lead Strategic Planner) (\$250/hr)	Sr. Consultant (Lead Analyst) (\$225/hr)	Consultant (Analyst) (\$195/hr)	Consultant (Analyst) (\$195/hr)	Consultant (Strategic Planner) (\$195/hr)	Est. Hrs.	Total Cost
<b>Task 2.1 Program Evaluation &amp; Reporting</b>									
Data Collection Feedback	1	4		25		35		65	\$ 13,720
Develop Data Collection Tools	2	4		25		20		51	\$ 11,065
Provide Ongoing CBO Data TA	2	12		25		25		64	\$ 14,040
Develop Evaluation Plans for Annual Reports	4	25		8	25			62	\$ 14,005
Data Collection & Analysis	2	25		40	50	50		167	\$ 35,290
YOBG & JIRBG Annual Report & Presentation	6	25		16	55			102	\$ 22,195
JJCPA & JPAF Annual Report & Presentation	6	25		16		50		97	\$ 21,220
<b>Subtotal</b>	<b>23</b>	<b>120</b>	<b>0</b>	<b>155</b>	<b>130</b>	<b>180</b>	<b>0</b>	<b>608</b>	<b>\$ 131,535</b>
<b>Task 2.3 Evaluation of Existing Resources</b>									
Develop Evaluation Framework	3	12		13	10	10		48	\$ 10,635
Collect & Analyze Data	3	12		17	31	31		94	\$ 19,725
Resources Guide Annual Update	5	7	30				30	72	\$ 16,450
<b>Subtotal</b>	<b>11</b>	<b>31</b>	<b>30</b>	<b>30</b>	<b>41</b>	<b>41</b>	<b>30</b>	<b>214</b>	<b>\$ 46,810</b>
<b>Tasks 2.4 &amp; 2.5 Juvenile Annual Plans</b>									
Develop JJCPA & YOBG Annual Plan	4	8	18		10		15	55	\$ 12,455
Develop JIRBG Annual Plan	4	8	18			10	15	55	\$ 12,455
<b>Subtotal</b>	<b>8</b>	<b>16</b>	<b>36</b>	<b>0</b>	<b>10</b>	<b>10</b>	<b>30</b>	<b>110</b>	<b>\$ 24,910</b>
<b>Task 2.7 Meetings &amp; Collaboration</b>									
Launch Meetings & Project Discovery	4	10	3	3	3	3	3	29	\$ 6,760
Probation Monthly Meetings	8	25	4	4	4	4	4	53	\$ 12,650
JJCC Quarterly & DJJ Realignment Meetings		52		18		8		78	\$ 18,610
CBO Quarterly Meetings		10		10		10		30	\$ 6,700
Project Management & Internal Meetings	8	25	8	8	8	8	8	73	\$ 16,890
<b>Subtotal</b>	<b>20</b>	<b>122</b>	<b>15</b>	<b>43</b>	<b>15</b>	<b>33</b>	<b>15</b>	<b>263</b>	<b>\$ 54,850</b>
<b>Subtotal</b>	<b>62</b>	<b>289</b>	<b>81</b>	<b>228</b>	<b>196</b>	<b>264</b>	<b>75</b>	<b>1195</b>	<b>\$ 258,105</b>
<b>Direct Expenses:</b>									
Participant Incentives									\$ 250
Travel Expenses									\$ 4,600
Translation Costs									\$ 250
In-Person Meeting Materials									\$ 100
<b>Direct Expenses Subtotal</b>									<b>\$ 5,200</b>
<b>Grand Total</b>									<b>\$ 263,305</b>

San Mateo County Probation Department  
RFP No. 2025-RFP-00559: Research and Evaluation Services

Proposed Budget: Juvenile Services (Year 2 – 2027)

Juvenile Services Tasks (2027)	Director (Project Sponsor) (\$270/hr)	Consulting Manager (Project Manager) (\$250/hr)	Consulting Manager (Lead Strategic Planner) (\$250/hr)	Sr. Consultant (Lead Analyst) (\$225/hr)	Consultant (Analyst) (\$195/hr)	Consultant (Analyst) (\$195/hr)	Consultant (Strategic Planner) (\$195/hr)	Est. Hrs.	Total Cost
<b>Task 2.1 Program Evaluation &amp; Reporting</b>									
Conduct Review & Improvement Cycle	1	4		18		18		41	\$ 8,830
Update Data Collection Tools	2	4		10		10		26	\$ 5,740
Provide Ongoing CBO Data TA	2	12		24		24		62	\$ 13,620
Update Evaluation Plans for Annual Reports	4	6		10	10			30	\$ 6,780
Data Collection & Analysis	2	25		35	45	45		152	\$ 32,215
YOBG & JRBG Annual Report & Presentation	5	25		15	45			90	\$ 19,750
JJCPA & JPAF Annual Report & Presentation	5	25		15		45		90	\$ 19,750
<b>Subtotal</b>	<b>21</b>	<b>101</b>	<b>0</b>	<b>127</b>	<b>100</b>	<b>142</b>	<b>0</b>	<b>491</b>	<b>\$ 106,685</b>
<b>Task 2.3 Evaluation of Existing Resources</b>									
Collect & Analyze Data	3	14		14	31	31		93	\$ 19,550
Stakeholder Input	10	55	55		55		55	230	\$ 51,650
Resources Evaluation Report & Presentation	12	50	30	15	30	15	30	182	\$ 41,240
Resources Guide Annual Update	5	8	25				25	63	\$ 14,475
<b>Subtotal</b>	<b>30</b>	<b>127</b>	<b>110</b>	<b>29</b>	<b>116</b>	<b>46</b>	<b>110</b>	<b>568</b>	<b>\$ 126,915</b>
<b>Tasks 2.4 &amp; 2.5 Juvenile Annual Plans</b>									
Develop JJCPA & YOBG Annual Plan	4	6	18		8		14	50	\$ 11,370
Develop JRBG Annual Plan	4	6	18			8	14	50	\$ 11,370
<b>Subtotal</b>	<b>8</b>	<b>12</b>	<b>36</b>	<b>0</b>	<b>8</b>	<b>8</b>	<b>28</b>	<b>100</b>	<b>\$ 22,740</b>
<b>Task 2.7 Meetings &amp; Collaboration</b>									
Probation Monthly Meetings	8	25	4	4	4	4	4	53	\$ 12,650
JJCC Quarterly & DJJ Realignment Meetings		52		18		8		78	\$ 18,610
CBO Quarterly Meetings		10		10		10		30	\$ 6,700
Project Management & Internal Meetings	8	25	8	8	8	8	8	73	\$ 16,890
<b>Subtotal</b>	<b>16</b>	<b>112</b>	<b>12</b>	<b>40</b>	<b>12</b>	<b>30</b>	<b>12</b>	<b>234</b>	<b>\$ 54,850</b>
<b>Subtotal</b>	<b>75</b>	<b>352</b>	<b>158</b>	<b>196</b>	<b>236</b>	<b>226</b>	<b>150</b>	<b>1393</b>	<b>\$ 311,190</b>
<b>Direct Expenses:</b>									
Participant Incentives									\$ 250
Travel Expenses									\$ 4,125
Translation Costs									\$ 750
In-Person Meeting Materials									\$ 250
<b>Direct Expenses Subtotal</b>									<b>\$ 5,375</b>
<b>Grand Total</b>									<b>\$ 316,565</b>

San Mateo County Probation Department  
RFP No. 2025-RFP-00559: Research and Evaluation Services

Proposed Budget: Juvenile Services (Year 3 – 2028)

Juvenile Services Tasks (2028)	Director (Project Sponsor) (\$270/hr)	Consulting Manager (Project Manager) (\$250/hr)	Consulting Manager (Lead Strategic Planner) (\$250/hr)	Sr. Consultant (Lead Analyst) (\$225/hr)	Consultant (Analyst) (\$195/hr)	Consultant (Analyst) (\$195/hr)	Consultant (Strategic Planner) (\$195/hr)	Est. Hrs.	Total Cost
<b>Task 2.1 Program Evaluation &amp; Reporting</b>									
Conduct Review & Improvement Cycle	1	4		18		18		41	\$ 8,830
Update Data Collection Tools	2	4		10		10		26	\$ 5,740
Provide Ongoing CBO Data TA	2	12		24		24		62	\$ 13,620
Update Evaluation Plans for Annual Reports	4	6		10	10			30	\$ 6,780
Data Collection & Analysis	2	25		35	45	45		152	\$ 32,215
YOBG & JIRBG Annual Report & Presentation	5	25		15	45			90	\$ 19,750
JJCPA & JPAF Annual Report & Presentation	5	25		15		45		90	\$ 19,750
<b>Subtotal</b>	<b>21</b>	<b>101</b>	<b>0</b>	<b>127</b>	<b>100</b>	<b>142</b>	<b>0</b>	<b>491</b>	<b>\$ 106,685</b>
<b>Task 2.3 Evaluation of Existing Resources</b>									
Resources Guide Annual Update	5	8	25				25	63	\$ 14,475
<b>Subtotal</b>	<b>5</b>	<b>8</b>	<b>25</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>25</b>	<b>63</b>	<b>\$ 14,475</b>
<b>Tasks 2.4 &amp; 2.5 Juvenile Annual Plans</b>									
Develop JJCPA & YOBG Annual Plan	4	8	20		10		15	57	\$ 12,955
Develop JIRBG Annual Plan	4	8	20			10	15	57	\$ 12,955
<b>Subtotal</b>	<b>8</b>	<b>16</b>	<b>40</b>	<b>0</b>	<b>10</b>	<b>10</b>	<b>30</b>	<b>114</b>	<b>\$ 25,910</b>
<b>Task 2.7 Meetings &amp; Collaboration</b>									
Probation Monthly Meetings	8	15	4	4	4	4	4	43	\$ 10,150
JJCC Quarterly & DJJ Realignment Meetings		37		18		6		61	\$ 14,470
CBO Quarterly Meetings		10		10		10		30	\$ 6,700
Project Management & Internal Meetings	4	15	4	4	4	4	4	39	\$ 9,070
<b>Subtotal</b>	<b>12</b>	<b>77</b>	<b>8</b>	<b>36</b>	<b>8</b>	<b>24</b>	<b>8</b>	<b>173</b>	<b>\$ 40,390</b>
<b>Subtotal</b>	<b>46</b>	<b>202</b>	<b>73</b>	<b>163</b>	<b>118</b>	<b>176</b>	<b>63</b>	<b>841</b>	<b>\$ 187,460</b>
<b>Direct Expenses:</b>									
Participant Incentives									\$ 250
Travel Expenses									\$ 1,575
Translation Costs									\$ 100
<b>Direct Expenses Subtotal</b>									<b>\$ 1,925</b>
<b>Grand Total</b>									<b>\$ 189,385</b>

San Mateo County Probation Department  
RFP No. 2025-RFP-00559: Research and Evaluation Services

Proposed Budget: Juvenile Services (Year 4 – 2029)

Juvenile Services Tasks (2029)	Director (Project Sponsor) (\$270/hr)	Consulting Manager (Project Manager) (\$250/hr)	Consulting Manager (Lead Strategic Planner) (\$250/hr)	Sr. Consultant (Lead Analyst) (\$225/hr)	Consultant (Analyst) (\$195/hr)	Consultant (Analyst) (\$195/hr)	Consultant (Strategic Planner) (\$195/hr)	Est. Hrs.	Total Cost
<b>Task 2.1 Program Evaluation &amp; Reporting</b>									
Conduct Review & Improvement Cycle	1	4		18		17		40	\$ 8,635
Update Data Collection Tools	2	4		10		10		26	\$ 5,740
Provide Ongoing CBO Data TA	2	12		24		24		62	\$ 13,620
Update Evaluation Plans for Annual Reports	4	6		10	10			30	\$ 6,780
Data Collection & Analysis	2	25		35	45	45		152	\$ 32,215
YOBG & JJRBG Annual Report & Presentation	5	25		15	45			90	\$ 19,750
JJCPA & JPAF Annual Report & Presentation	5	25		15		45		90	\$ 19,750
<b>Subtotal</b>	<b>21</b>	<b>101</b>	<b>0</b>	<b>127</b>	<b>100</b>	<b>141</b>	<b>0</b>	<b>490</b>	<b>\$ 106,490</b>
<b>Task 2.2 2030-2035 LAP Development</b>									
Design Planning Process & Stakeholder Engagement	4	4	25				25	58	\$ 13,205
Conduct Landscape Analysis	4	8		40	40	40		132	\$ 27,680
Facilitate Input Gathering Activities	40	60	60	60	60	60	60	400	\$ 89,400
LAP Data Analysis	10	10	10	20	20	20	20	110	\$ 23,900
Develop Draft LAP	10	20	15	15	15	15	15	105	\$ 23,600
<b>Subtotal</b>	<b>68</b>	<b>102</b>	<b>110</b>	<b>135</b>	<b>135</b>	<b>135</b>	<b>120</b>	<b>805</b>	<b>\$ 177,785</b>
<b>Task 2.3 Evaluation of Existing Resources</b>									
5-Year Comprehensive Resources Guide Update	10	28	55	18	18	18	55	202	\$ 45,245
<b>Subtotal</b>	<b>10</b>	<b>28</b>	<b>55</b>	<b>18</b>	<b>18</b>	<b>18</b>	<b>55</b>	<b>202</b>	<b>\$ 45,245</b>
<b>Tasks 2.4 &amp; 2.5 Juvenile Annual Plans</b>									
Develop JJCPA & YOBG Annual Plan	4	6	18		10		15	53	\$ 11,955
Develop JJRBG Annual Plan	4	6	18			10	15	53	\$ 11,955
<b>Subtotal</b>	<b>8</b>	<b>12</b>	<b>36</b>	<b>0</b>	<b>10</b>	<b>10</b>	<b>30</b>	<b>106</b>	<b>\$ 23,910</b>
<b>Task 2.7 Meetings &amp; Collaboration</b>									
Probation Monthly Meetings	8	15	4	4	4	4	4	43	\$ 10,150
JJCC Quarterly & DJJ Realignment Meetings		37		18		6		61	\$ 14,470
CBO Quarterly Meetings		10		10		10		30	\$ 6,700
Project Management & Internal Meetings	4	15	4	4	4	4	4	39	\$ 9,070
<b>Subtotal</b>	<b>12</b>	<b>77</b>	<b>8</b>	<b>36</b>	<b>8</b>	<b>24</b>	<b>8</b>	<b>173</b>	<b>\$ 40,390</b>
<b>Subtotal</b>	<b>119</b>	<b>320</b>	<b>209</b>	<b>316</b>	<b>271</b>	<b>328</b>	<b>213</b>	<b>1776</b>	<b>\$ 393,820</b>
<b>Direct Expenses:</b>									
Participant Incentives									\$ 1,750
Travel Expenses									\$ 13,575
Translation Costs									\$ 2,000
In-Person Meeting Materials									\$ 2,000
<b>Direct Expenses Subtotal</b>									<b>\$ 19,325</b>
<b>Grand Total</b>									<b>\$ 413,145</b>

San Mateo County Probation Department  
RFP No. 2025-RFP-00559: Research and Evaluation Services

Proposed Budget: Juvenile Services (Year 5 – 2030)

Juvenile Services Tasks (2030)	Director (Project Sponsor) (\$270/hr)	Consulting Manager (Project Manager) (\$250/hr)	Consulting Manager (Lead Strategic Planner) (\$250/hr)	Sr. Consultant (Lead Analyst) (\$225/hr)	Consultant (Analyst) (\$195/hr)	Consultant (Analyst) (\$195/hr)	Consultant (Strategic Planner) (\$195/hr)	Est. Hrs.	Total Cost
<b>Task 2.1 Program Evaluation &amp; Reporting</b>									
Conduct Review & Improvement Cycle	1	4		18		18		41	\$ 8,830
Update Data Collection Tools	2	4		10		10		26	\$ 5,740
Provide Ongoing CBO Data TA	2	12		24		24		62	\$ 13,620
Update Evaluation Plans for Annual Reports	4	6		10	10			30	\$ 6,780
Data Collection & Analysis	2	25		35	45	45		152	\$ 32,215
YOBG & JIRBG Annual Report & Presentation	5	25		15	45			90	\$ 19,750
JJCPA & JPAF Annual Report & Presentation	5	25		15		45		90	\$ 19,750
<b>Subtotal</b>	<b>21</b>	<b>101</b>	<b>0</b>	<b>127</b>	<b>100</b>	<b>142</b>	<b>0</b>	<b>491</b>	<b>\$ 106,685</b>
<b>Task 2.2 2030-2035 LAP Development</b>									
Finalize LAP & Presentation	5	50	50			10	10	125	\$ 30,250
Prepare Community Summary Materials	5	10	10			10	10	45	\$ 10,250
<b>Subtotal</b>	<b>10</b>	<b>60</b>	<b>60</b>	<b>0</b>	<b>0</b>	<b>20</b>	<b>20</b>	<b>170</b>	<b>\$ 40,500</b>
<b>Task 2.3 Evaluation of Existing Resources</b>									
Resources Guide Annual Update	5	8	25				25	63	\$ 14,475
<b>Subtotal</b>	<b>5</b>	<b>8</b>	<b>25</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>25</b>	<b>63</b>	<b>\$ 14,475</b>
<b>Tasks 2.4 &amp; 2.5 Juvenile Annual Plans</b>									
Develop JJCPA & YOBG Annual Plan	4	8	20		10		15	57	\$ 12,955
Develop JIRBG Annual Plan	4	8	20			10	15	57	\$ 12,955
<b>Subtotal</b>	<b>8</b>	<b>16</b>	<b>40</b>	<b>0</b>	<b>10</b>	<b>10</b>	<b>30</b>	<b>114</b>	<b>\$ 25,910</b>
<b>Task 2.7 Meetings &amp; Collaboration</b>									
Probation Monthly Meetings	8	15	4	4	4	4	4	43	\$ 10,150
JJCC Quarterly & DJJ Realignment Meetings		37		18		6		61	\$ 14,470
CBO Quarterly Meetings		10		10		10		30	\$ 6,700
Project Management & Internal Meetings	4	15	4	4	4	4	4	39	\$ 9,070
<b>Subtotal</b>	<b>12</b>	<b>77</b>	<b>8</b>	<b>36</b>	<b>8</b>	<b>24</b>	<b>8</b>	<b>173</b>	<b>\$ 40,390</b>
<b>Subtotal</b>	<b>56</b>	<b>262</b>	<b>133</b>	<b>163</b>	<b>118</b>	<b>196</b>	<b>83</b>	<b>1011</b>	<b>\$ 227,960</b>
<b>Direct Expenses:</b>									
Travel Expenses									\$ 3,075
Translation Costs									\$ 250
<b>Direct Expenses Subtotal</b>									<b>\$ 3,325</b>
<b>Grand Total</b>									<b>\$ 231,285</b>

San Mateo County Probation Department  
RFP No. 2025-RFP-00559: Research and Evaluation Services

Proposed Budget: Adult and Pretrial Services (2026-2030)

<b>Adult &amp; Pretrial Services Tasks</b>	<i>Director (Project Sponsor)</i> (\$270/hr)	<i>Consulting Manager (Project Manager)</i> (\$250/hr)	<i>Consulting Manager (Lead Strategic Planner)</i> (\$250/hr)	<i>Sr. Consultant (Lead Analyst)</i> (\$225/hr)	<i>Consultant (Analyst)</i> (\$195/hr)	<i>Consultant (Analyst)</i> (\$195/hr)	<i>Consultant (Strategic Planner)</i> (\$195/hr)	<i>Est. Hrs.</i>	<i>Total Cost</i>
<b>Task 2.3 Evaluation of Existing Resources</b>									
Develop Evaluation Framework	2	5		5	5	5		22	\$ 4,865
Collect & Analyze Data	4	11		13	28	28		84	\$ 17,675
Stakeholder Input	10	55	55		55		55	230	\$ 51,650
Resources Evaluation Report & Presentation	12	50	30	15	30	15	30	182	\$ 41,240
<b>Subtotal</b>	<b>28</b>	<b>121</b>	<b>85</b>	<b>33</b>	<b>118</b>	<b>48</b>	<b>85</b>	<b>518</b>	<b>\$ 115,430</b>
<b>Task 2.6 Adult &amp; Pretrial Services R&amp;A</b>									
CCP Local Implementation Plan	20	40	90				120	270	\$ 61,300
Adult & Pretrial Services Evaluation TBD									\$ 375,000
<b>Subtotal</b>	<b>20</b>	<b>40</b>	<b>90</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>120</b>	<b>270</b>	<b>\$ 436,300</b>
<b>Task 2.7 Meetings &amp; Collaboration</b>									
Launch Meetings & Project Discovery	2	5	2	2	2	2	2	17	\$ 3,910
Probation Monthly Meetings	20	41	10	10	10	10	10	111	\$ 26,250
CCP Meetings		35		15		15		65	\$ 15,050
Project Management & Internal Meetings	16	44	16	16	16	16	16	140	\$ 32,280
<b>Subtotal</b>	<b>38</b>	<b>125</b>	<b>28</b>	<b>43</b>	<b>28</b>	<b>43</b>	<b>28</b>	<b>333</b>	<b>\$ 73,580</b>
<b>Subtotal</b>	<b>86</b>	<b>286</b>	<b>203</b>	<b>76</b>	<b>146</b>	<b>91</b>	<b>233</b>	<b>1121</b>	<b>\$ 625,310</b>
<b>Direct Expenses:</b>									
Participant Incentives									\$ 1,250
Travel Expenses									\$ 11,250
Translation Costs									\$ 1,750
In-Person Meeting Materials									\$ 350
<b>Direct Expenses Subtotal</b>									<b>\$ 14,600</b>
<b>Grand Total</b>									<b>\$ 639,910</b>

### Relevant Pretrial Program Evaluation Experience

In accordance with the RFP's Question and Answer addendum allowance to submit examples of prior pretrial evaluation work in place of a proposed budget (estimated at \$75,000 per year) for these activities, the following projects demonstrate RDA's experience and qualifications in pretrial program evaluation. Each example includes the completion date, scope of work, and specific tasks performed.

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#### **San Francisco Pretrial Diversion Project – California Violence Intervention and Prevention (CalCRG) Evaluation (2/1/2022 - 6/30/2024)**

**Scope of Work:** RDA evaluated the San Francisco Pretrial Diversion Project's CalCRG-funded program, which aimed to reduce community violence and improve outcomes for justice-involved individuals through expanded pretrial services.

**Tasks Performed:** Conducted a mixed-methods evaluation including stakeholder interviews, focus groups, and quantitative data analysis; assessed program implementation fidelity and participant outcomes; analyzed trends in client engagement and case outcomes; developed actionable recommendations for program improvement; and prepared evaluation reports aligned with state grant reporting requirements.

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#### **San Francisco Pretrial Diversion Project – Research and Evaluation (9/25/2018 - 12/31/2020)**

**Scope of Work:** Provided research and evaluation services to assist the San Francisco Pretrial Diversion Project (SF Pretrial) in identifying and conveying its value in response to Senate Bill (SB) 10.

**Tasks Performed:** Conducted benchmarking research, literature review, and key informant interviews on pretrial models used across California and the United States and established "best" or "promising" pretrial practices and models; assessed SF Pretrial's operation and performed an analysis of the impacts of its services; developed collateral materials outlining SF Pretrial's strengths, impacts, and unique benefits they provide as San Francisco's pretrial services provider.

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#### **Arnold Ventures, City University of New York – Reducing Revocations Challenge Phase I (10/1/2019 - 7/31/2021)**

**Scope of Work:** Partnered in a national research initiative to identify drivers of probation and parole revocations and design data-informed strategies to reduce them.

**Tasks Performed:** Conducted detailed analysis of administrative supervision data; mapped revocation pathways; interviewed supervision officers and stakeholders; synthesized findings to identify policy and practice drivers; and collaborated with partners to develop intervention strategies.

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#### **Arnold Ventures, City University of New York – Reducing Revocations Challenge Phase II (10/1/2021 - 9/30/2023)**

**Scope of Work:** Built on Phase I findings to implement and evaluate targeted interventions aimed at reducing revocations and improving supervision outcomes.

**Tasks Performed:** Monitored implementation of policy and practice changes; collected and analyzed outcome and process data; facilitated regular learning sessions with local partners; refined strategies based on emerging findings; and produced reports detailing impact and lessons learned for broader dissemination.

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**Yolo County Probation – SB 36 Pretrial Risk Assessment Tool Validation Study (10/1/2023 - 5/1/2024)**

**Scope of Work:** Validated the Public Safety Assessment (PSA) tool to ensure predictive accuracy and fairness across demographic groups in Yolo County’s pretrial decision-making.

**Specific Tasks Performed:** Designed validation methodology; analyzed historical pretrial data; conducted subgroup analyses to identify potential disparities; developed recommendations for tool adjustments.

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**Contra Costa County Probation – Public Safety Assessment (PSA) Validation Study (6/1/2024 - 12/31/2024)**

**Scope of Work:** Assessed the predictive validity of the PSA in the County’s pretrial population and evaluated its performance across race, gender, and age groups.

**Specific Tasks Performed:** Extracted and cleaned multi-year case data; performed predictive accuracy and disparity analyses; presented findings to the Probation Department and Judicial Council representatives.

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**Contra Costa County Probation – ORAS/OYAS Interrater Reliability Study (7/1/2023 - 6/30/2024)**

**Scope of Work:** Measured consistency in staff scoring of the ORAS and OYAS assessment tools to strengthen reliability in case planning and supervision decisions.

**Specific Tasks Performed:** Developed interrater reliability testing protocol; trained staff on scoring procedures; analyzed scoring consistency; provided recommendations for training and quality assurance.

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**Contra Costa County Probation – ORAS/OYAS Validation Study (1/1/2025 - Present)**

**Scope of Work:** Validate the ORAS and OYAS assessment tools to ensure accurate risk/needs classification and to guide service matching.

**Specific Tasks Performed:** Design validation plan; conduct statistical analysis of assessment scores and recidivism outcomes; identify areas for tool refinement; deliver comprehensive validation report.



County of San Mateo

## Probation

John T. Keene, Chief Probation Officer  
400 County Center, Redwood City, CA 94063

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### [SOCIAL CHANGE PARTNERS] RESPONSE DOCUMENT REPORT

RFP No. 2025-RFP-00559

Research and Evaluation Services

RESPONSE DEADLINE: August 12, 2025 at 5:00 pm

Report Generated: Wednesday, August 13, 2025

### Social Change Partners Response

#### CONTACT INFORMATION

**Company:**

Social Change Partners

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reed@socialchangepartners.com

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Reed Connell

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San Francisco, CA 94133

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**Submission Date:**

Aug 12, 2025 9:35 AM (Pacific Time)

## ADDENDA CONFIRMATION

Addendum #1

*Confirmed Aug 8, 2025 12:04 AM by Reed Connell*

## QUESTIONNAIRE

### 1. Minimum Qualifications

HAS THE PROPOSER BEEN PROVIDING SIMILAR SERVICES FOR A MINIMUM OF FOUR (4) YEARS WITHIN THE LAST SEVEN (7) YEARS?\*

Yes

DOES THE PROGRAM MANAGER HAVE A MINIMUM OF TWO (2) YEARS OF EXPERIENCE WITHIN THE LAST FIVE (5) YEARS IN MANAGING PROGRAMS OF THIS SIZE?\*

Yes

PLEASE CONFIRM YOUR FIRM IS REGISTERED WITH SYSTEM FOR AWARD MANAGEMENT (SAM)\*

[SAM.gov](https://sam.gov)

Confirmed

WHAT IS THE REGISTERED BUSINESS NAME AND UNIQUE ENTITY ID (UEI) NO.?\*

- UEI number can be obtained by registering your business through SAM.GOV
- Should you be in the process of obtaining your UEI number, please enter the digits '123' temporarily for your response below in order to proceed with proposal. This temporary number should be replaced with the correct registration number for submission of the proposal.

Y9WGHX7H3R3

## 2. Procurement Preference for Local Businesses and Local Non-Profits

IS THE PROPOSER A "LOCAL BUSINESS"?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code, a "Local Business" means any for-profit business which has its principal place of business, or is headquartered, in San Mateo County. If this designation applies to the proposer, a self-attestation form must be completed and provided with this response.

Please download the below documents, complete, and upload. If this designation is not applicable, please leave blank.

- [SMC LocalBusiness self-atte...](#)

No response submitted

IS THE PROPOSER A NON-PROFIT?\*

A Non-Profit is defined as a tax-exempt public charity organization (within the meaning of section 501(c)(3) of the Internal Revenue Code) that is formed for purposes other than making a profit, is exempt from paying federal income taxes on the income generated for their exempt purposes.

No

IS THE PROPOSER A LOCAL "SMALL" OR "MICRO" BUSINESS?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code:

"Small Business" means any business which holds a Small Business Certification awarded by the California Office of Small Business and Disabled Veteran Business Enterprise Services (OSDS).

"Micro Business" means any Small Business certified by the OSDS which is automatically designated by the OSDS as a Micro Business due to gross annual receipts falling below the OSDS-designated dollar amount.

If the above designations apply, please provide the OSDS provided Certification ID.

If this designation is not applicable, please leave blank.

No response submitted

IS THE PROPOSER A LOCAL "SMALL" OR "MICRO" NON-PROFIT?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code:

"Small Non-Profit" means a Local Non-Profit with an annual revenue of \$1,000,000 to \$2,500,000 according to its most recently filed IRS Form 990.

"Micro Non-Profit" means a Local Non-Profit with an annual revenue of less than \$1,000,000, according to its most recently filed IRS Form 990.

If the above designations apply, please provide your latest filed IRS form 990. A filing from the last two calendar years is acceptable.

If this designation is not applicable, please leave blank.

No response submitted

### 3. Technical Proposal

INTRODUCTION AND EXECUTIVE SUMMARY \*

Submit a letter of introduction and executive summary of the proposal. The letter must contain:

- Name, title and contact information (email, phone, and address) for representative of proposer that is responsible for communication related to this RFP.
- Name, title, contact information, and signature of person authorized to obligate firm to perform the commitment contained in the proposal.

Submission of the letter will constitute a representation by proposer that it is willing and able to perform the commitments contained in the proposal and has not violated the terms of this RFP.

Social\_Change\_Partners\_RFP\_No\_2025\_RFP\_00559\_Research\_and\_Evaluation\_Services\_Intro\_and\_Exec\_Summary.pdf

STATEMENT OF MINIMUM QUALIFICATIONS \*

Describe how the proposer meets the minimum qualifications as set forth in **Minimum Qualifications** of this RFP.

Submission of the Minimum Qualifications checklist is not a substitute for providing a detailed written response.

Social Change Partners (SCP) meets and exceeds all of the minimum qualifications outlined in the RFP.

### **Similar Services for a Minimum of Four (4) Years within the Last Seven (7) Years**

SCP has provided community-engaged planning, research, evaluation, and technical assistance services to public agencies for over a decade. Since our founding in 2013, SCP has delivered high-quality consulting services to county governments, state agencies, and nonprofit organizations across California and other states, including New Mexico, Nevada, and Washington. Our team brings a long-standing track record of successful projects aligned with the scope of this RFP, including program evaluation, performance measurement, strategic planning, facilitation, community engagement, and technical assistance with the development of Local Action Plans and similar system-level strategies.

SCP has contracted with San Mateo County Human Service Agency since 2022 to create and implement the county's Comprehensive Prevention Plan (CPP). The goal of the county's CPP is to develop an actionable vision to expand and embed supportive community-based resources for the County's families to reduce foster care entry while also increasing the county's ability to draw upon federal funding resources to support county programming. The CPP was developed in partnership with a diverse set of county stakeholders including the Office of Education, Behavioral Health, First 5, lived experience advocates, and community-based service providers. Current work is focused on launching a community pathway that enables families to access child-welfare funded services through community providers without first undergoing the traumatic experience of a CPS investigation. SCP is also working with the county to design and launch well-supported evidence-based practices that are eligible for reimbursement through IV-E Prevention, an uncapped federal entitlement program. This reimbursement will both fund programming and reduce the administrative cost burden of providing services to families. This work has the added benefit of uniting and aligning the County's many resources to support families and reduce child abuse. To support this alignment, SCP participates in SMC's Child Abuse and Prevention Committee.

SCP also has direct experience with county probation departments including strategic planning partnerships in Placer County and cross-system coordination involving probation in Butte, Napa, Solano, and 12 other California counties. Our probation project deliverables include C-CFSR County Self-Assessments and System Improvement Plans; policy, program design, and evaluation for older youth programs; and Placer County's Comprehensive Multi-Agency Juvenile Justice Plan

### **Program Manager Experience**

SCP Managing Partner Reed Connell has over 20 years of experience in managing multi-year initiatives of comparable size and scope across numerous jurisdictions. Reed will serve as the lead for this contract and has over five years of recent experience managing

similar evaluation and planning contracts for county probation departments and public agencies. Recent successful projects that engaged with county probation departments are detailed below.

Reed has supervised the proposed project team in research and evaluation projects across several California counties and three states and has funded and supervised university-led research projects, including a randomized controlled trial. The proposed project team has an ongoing line of business in supporting county child welfare agencies, including San Mateo, in multi-stakeholder planning process involving data collection, analysis, and capacity building across multiple systems.

### **SAM.gov Registration**

SCP is registered in the System for Award Management (SAM.gov) and remains in active status:

- **Business Name:** Social Change Partners, LLC
- **Unique Entity ID (UEI)** Y9WGHZ71H3R3

SCP is fully authorized to conduct business in California and remains in good standing with all required governmental and tax entities. Our experience, capacity, and compliance history demonstrate that SCP is well-positioned to fulfill the County's expectations and deliver high-quality work in alignment with the goals of this procurement.

### **PROJECT APPROACH\***

This section should correlate to the Scope of Work . Proposer should give a short summary describing how it will perform the relevant work

Social Change Partners (SCP) proposes a structured, equity-driven, and outcomes-focused approach to support San Mateo County Probation in achieving its research and evaluation goals. Our methodology is grounded in continuous quality improvement (CQI), meaningful stakeholder engagement, and accessible reporting that drives data-informed decision-making.

What distinguishes SCP is the intentionality behind our work and our commitment to leaving our clients with sustainable systems, processes, and skills that continue to serve them long after our engagement ends. We combine technical evaluation expertise with deep facilitation skills, ensuring that findings are not just collected but embedded into the daily practice of the agencies we support. While building on prior efforts, we approach each engagement with a fresh perspective, starting with a clear understanding of client expectations, preferred ways of working, and the support needed to ensure the process meets their goals and desired outcomes.

Every project is approached with intention, quality, and focus on creating lasting value. Our approach aligns closely with all components of the County's Scope of Work.

### **Continuity and Transition Protocol**

SCP will begin this engagement with a comprehensive transition assessment, including:

- Review of prior reports, data collection instruments, and stakeholder feedback
- Interviews with key County staff and CBO partners to understand current processes and improvement opportunities
- Analysis of existing data systems and integration opportunities
- Development of a continuity plan that maintains essential functions while implementing enhancements

This assessment will inform our Year 1 implementation strategy, ensuring no disruption to critical reporting deadlines while introducing improved methodologies and expanded community engagement.

### **Program Evaluation and Reporting**

SCP will design and implement a collaborative evaluation framework that assesses the effectiveness of juvenile justice programs funded through JJCPA, JPAF, YOBG, and JJRBG. This includes qualitative and quantitative data collection from approximately 12 contracted community-based organizations (CBOs). We take a comprehensive approach that blends case-level analysis, program-level evaluation, and system-level review, ensuring that outcomes are examined from multiple perspectives. Our team will:

- Develop data collection protocols aligned with program objectives and performance measures.
- Provide technical assistance to CBOs to ensure quality and consistency of data.
- Analyze data on program dosage, demographics, and outcomes, and identify both strengths and challenges.
- Incorporate youth and family voice by gathering client success stories that reflect lived experiences.
- Produce two public-facing annual reports (YOBG/JJRBG and JJCPA/JPAF) designed for both the Juvenile Justice Coordinating Council (JJCC) and broader community audiences.

### **Local Action Plan (LAP) Development**

To support the 2030–2035 LAP, SCP will facilitate a comprehensive, collaborative planning process. This includes:

- Conducting an assessment of local resources and high-risk areas.
- Gathering and synthesizing stakeholder input through listening sessions, interviews, and facilitated meetings with the JJCC, CBOs, and Probation leadership.
- Drafting a strategic, actionable LAP that integrates performance metrics, data system capacity, and implementation recommendations.

Our process ensures that the LAP is not just a compliance document, but a living strategy that reflects community priorities and is feasible to implement and sustain.

### **Evaluation of Existing Resources**

SCP will evaluate service availability and alignment across Probation’s Juvenile, Institutions, Adult, and Pretrial Services divisions. Our approach includes:

- Mapping current services and identifying duplication or gaps.
- Engaging relevant system partners in identifying cross-sector opportunities.
- Producing a user-friendly, annually updated “Resources Guide for Youth and Their Families” that supports awareness and navigation.

Where applicable, we will integrate both quantitative outcome data and qualitative lived or expert experience insights to ensure the guide reflects the real-world accessibility and impact of services. We will also prioritize leveraging existing data, tools, and resources to avoid duplicative work and ensure that efforts are focused on filling true gaps and enhancing what is already in place.

### **Annual Plans: JJCPA/YOBG and JIRBG**

SCP will provide technical assistance in the preparation of San Mateo County’s annual JJCPA/YOBG and JIRBG Plans. Our work includes synthesizing program data, facilitating public input processes, and aligning plan content with BSCC requirements. We prioritize making these plans accessible to all audiences, transforming compliance-driven reporting to tools for transparency, accountability, and strategic alignment.

### **Adult and Pretrial Services Research & Analysis**

SCP will support analysis of programs such as the Community Corrections Partnership (CCP) Local Implementation Plan and Pretrial Services initiatives. Our team will:

- Identify key performance indicators.
- Analyze outcomes related to supervision, service access, and court appearance rates.
- Produce recommendations to enhance service impact and accountability.

Our approach includes identifying practical adjustments that can be implemented quickly while also mapping long-term systemic improvements.

### **Collaboration and Meetings**

SCP will maintain consistent communication and partnership with Probation leadership, attending required monthly check-ins, quarterly JJCC and CBO meetings, and Realignment Subcommittee meetings. We operate as a thought partner, not just a vendor, sharing knowledge openly, supporting capacity-building, and ensuring stakeholders are confident in using evaluation findings to inform ongoing efforts. We bring a facilitative style that is structured, accessible, and relationship-based, ensuring productive collaboration throughout the life of the contract.

### **Local Partnership and Presence**

While SCP is headquartered in San Francisco, our existing partnership with San Mateo County through the Comprehensive Prevention Plan provides deep familiarity with local stakeholders, political dynamics, and service landscapes. Our team has established relationships with key County departments, community-based organizations, and community leaders that will ensure seamless integration with existing efforts.

SCP commits to robust local presence for this engagement, including:

- Dedicated project team members available for in-person meetings
- Regular presence at County offices during planning phases
- Community engagement sessions held in accessible neighborhood locations
- Participation in all required in-person meetings without additional travel costs

Our understanding of San Mateo County's unique context includes familiarity with the demographic diversity across the Peninsula, the technology sector's influence on local economies and housing, and the County's progressive approach to criminal justice reform and prevention-focused service delivery.

### **SCP's Distinct Approach**

Knowing that there is an incumbent contractor, and that there are a number of larger firms that routinely pursue similar scopes of work, SCP offers the following differentiators:

**Community Co-Design vs. Traditional Evaluation:** Unlike conventional evaluation contractors who extract data from communities, SCP partners with youth, families, and service providers to co-design evaluation questions, methods, and interpretation. This approach yields more accurate data, builds stakeholder investment in findings, and ensures recommendations reflect community priorities alongside compliance requirements.

**Cross-System Integration vs. Siloed Program Evaluation:** SCP evaluates programs within their broader system context, identifying coordination opportunities and resource leverage points that traditional program-by-program evaluation misses. Our work connects juvenile justice investments to broader County priorities in education, behavioral health, and family support.

**Capacity Building Focus vs. Just Reporting:** Every SCP engagement includes intentional knowledge transfer, ensuring County and CBO staff gain evaluation skills, data literacy, and continuous improvement capabilities that outlast our contract. We build sustainable evaluation systems rather than creating dependency on external consultants.

**Equity-Centered Methodology vs. Standard Compliance Reporting:** SCP integrates racial equity analysis into all evaluation activities, disaggregating data to illuminate disparities and working with stakeholders to develop anti-racist recommendations. Our approach treats equity as foundational to effective programming rather than an add-on consideration.

### **SCOPE OF WORK TASKS/MILESTONES\***

Describe your proposed approach to tasks/milestones

Social Change Partners (SCP) proposes the following approach to complete the tasks and milestones outlined in the Scope of Work. This structure is designed to support the County's goals for evaluation, planning, community engagement, and public accountability.

### **TASK 1: Juvenile Program Evaluation and Reporting**

**Milestones:**

- Conduct onboarding meetings with Probation and all funded community-based organizations (CBOs) to review reporting requirements and data collection protocols.
- Provide ongoing technical assistance to CBOs, including guidance on performance metrics, evidence-based tools, and reporting expectations.
- Analyze data submitted by CBOs, including dosage, demographics, outcome measures, and client feedback.
- Draft and finalize two annual public reports: one covering YOBG and JJRBG-funded programs and another covering JJCPA and JPAF-funded programs.
- Develop presentation materials for the Juvenile Justice Coordinating Council (JJCC) based on annual reports.

**Estimated Timing:**

- Initiation in Q1, reporting completed annually by agreed-upon deadlines.

**TASK 2: Local Action Plan (LAP) Development (2030–2035)**

**Milestones:**

- Conduct a scan of existing plans, resources, and high-risk areas using local data and stakeholder input.
- Facilitate listening sessions and interviews with the JJCC, Probation staff, CBOs, and other key stakeholders.
- Draft strategic goals, performance measures, and implementation strategies for the LAP.
- Circulate draft LAP for review and incorporate feedback.
- Finalize and submit the 2030–2035 LAP to the County for approval.

**Estimated Timing:**

- Planning to begin in Year 1 with final submission in alignment with County timelines.

**TASK 3: Resource Evaluation and Annual Resource Guide**

**Milestones:**

- Map existing services across Juvenile, Adult, Institutions, and Pretrial divisions, including health, mental health, education, housing, and intervention programs.
- Conduct interviews with stakeholders to identify unmet needs and opportunities for improvement.
- Create a new Resource Guide for Youth and Their Families, integrating existing documents into a broader map of services across Juvenile, Adult, Institutions, and Pretrial divisions. Partner with Probation and stakeholders to ensure comprehensiveness and enhance usability.

**Estimated Timing:**

- Initial guide in Year 1, with updates each following year.

**TASK 4: JJCPA/YOBG Annual Plan Support**

**Milestones:**

- Review data from funded programs and align with state planning templates and requirements.
- Draft JJCPA and YOBG Annual Plan content.
- Facilitate public meetings and stakeholder input as needed.
- Finalize and submit plan drafts to the County for review.

**Estimated Timing:**

- Annually, in accordance with BSCC deadlines.

**TASK 5: JJRBG Annual Plan Development**

**Milestones:**

- Coordinate with Probation to draft the annual JJRBG Plan, including required program descriptions and outcome metrics.
- Facilitate public input sessions in collaboration with the JJCC.

- Submit the final plan according to state requirements.

**Estimated Timing:**

- Annually, in accordance with SB 823 timelines.

**TASK 6: Adult and Pretrial Services Research and Analysis**

**Milestones:**

- Conduct research on selected Adult and Pretrial Services programs, including CCP Local Implementation Plan and Pretrial Services.
- Analyze program outcomes, referral pathways, and system performance.
- Prepare summary reports with recommendations for improvement.

**Estimated Timing:**

- Ongoing throughout the term, based on County priorities.

**TASK 7: Meeting Participation and Collaboration**

**Milestones:**

- Attend all required monthly meetings with Probation.
- Participate in quarterly JJCC and CBO meetings.
- Join JJCC Realignment Subcommittee meetings as scheduled.
- Provide written updates on progress, deliverables, and key findings.

**Estimated Timing:**

- Recurring throughout the life of the contract.

#### PROPOSED SCHEDULE \*

Attach proposed schedule reference ability to complete the project within the County's required time frame

Social\_Change\_Partners\_RFP\_No\_2025\_RFP\_00559\_Research\_and\_Evaluation\_Services\_Proposed\_Schedule.pdf

#### INNOVATIONS\*

Refence any notable innovations or improvements that you expect to provide (with respect to, for example, efficiency, technology, sustainability)

Social Change Partners (SCP) brings a history of designing and implementing thoughtful innovations that improve efficiency, center equity, and enhance the impact of evaluation and planning efforts. In our work with counties across California and with state partners in New Mexico and Nevada, we have introduced strategies and tools that not only streamline processes but also increase engagement and utility for diverse audiences. For San Mateo County, we anticipate the following innovations will strengthen project outcomes:

##### **Integrated Data Storytelling**

Rather than relying solely on technical data tables, SCP integrates quantitative findings with stakeholder perspectives and client voice to create compelling, accessible narratives. This includes success stories from youth and families, visual data summaries, and plain-language descriptions that improve comprehension across a wide range of audiences, including the Juvenile Justice Coordinating Council (JJCC), county leadership, and the general public.

##### **Community-Centered Planning Tools**

SCP has developed a suite of facilitation strategies and templates that increase the quality and inclusiveness of stakeholder engagement. These tools ensure that community voices, especially those of youth and families with lived experience, are embedded meaningfully in planning documents such as the Local Action Plan (LAP) and the Juvenile Justice Realignment Block Grant (JJRBG) Plan. We routinely conduct evening and weekend sessions, offer stipends, and create space for youth-led recommendations to be incorporated directly into policy and program design.

##### **Continuous Quality Improvement (CQI) Built into Reporting**

Our evaluation approach goes beyond compliance reporting by embedding CQI principles into our methods. This includes year-over-year comparisons, identification of emerging trends, and practical recommendations for performance improvement that are

grounded in the data. Our public reports are not only a reflection of past performance but are designed to guide future investment decisions and support program refinement.

### **Real-Time Performance Dashboards for CBOs**

SCP will develop interactive dashboards allowing CBOs and Probation staff to monitor program performance in real-time, identifying trends and enabling rapid course corrections. These dashboards will include automated alerts for programs falling below performance thresholds and best practice sharing features highlighting successful interventions across the CBO network.

### **Youth-Led Evaluation Components**

Building on our community-based participatory research expertise, SCP will train justice-involved youth to co-conduct evaluation activities, including peer interviews, program assessments, and recommendation development. This approach not only improves data quality by centering lived experience but also builds leadership skills and system investment among participants.

### **Probation-Specific Cross-System Data Integration**

SCP will develop protocols for integrating Probation data with education, behavioral health, and social services data to create comprehensive client profiles that inform case planning and resource allocation. This innovation addresses the fragmented nature of services for justice-involved youth while maintaining appropriate confidentiality protections.

### **Cross-System Alignment**

SCP has demonstrated success aligning planning processes across child welfare, behavioral health, and juvenile justice systems. We bring a coordinated approach that connects the LAP, Resource Guide, and program evaluations with broader county initiatives. This ensures efficient use of stakeholder time, reduces duplication, and promotes integrated service strategies.

### **Accessible and Public-Facing Deliverables**

We prioritize the creation of reports, guides, and planning documents that are accessible to community members. This includes designing visually engaging layouts, using plain language summaries, and translating materials when appropriate. Our goal is to create transparency and accountability while also increasing public understanding of the County's investments and strategies.

### **Flexibility to Adapt in Real Time**

SCP's size and structure allow us to be highly responsive to County needs. We are able to pivot quickly, integrate last-minute data, and adjust plans to reflect new requirements or emerging priorities. We routinely build in “pause and assess” checkpoints to evaluate progress and make course corrections in collaboration with County leadership.

#### PERFORMANCE MEASURES\*

Describe a plan for achieving performance measures

Social Change Partners (SCP) takes a structured and intentional approach to developing and monitoring performance measures that are both meaningful and actionable. Our methodology ensures that data collected through evaluation and planning processes are not only used for compliance but also drive continuous improvement and strategic decision-making.

#### Approach to Performance Measures

SCP will work with San Mateo County Probation to establish or refine performance measures that reflect program effectiveness, equity, service access, and long-term outcomes. These measures will be aligned with County priorities, state funding requirements (including those of JJCPA, YOBG, and JIRBG), and community expectations. In addition, our framework will incorporate both quantitative and qualitative evaluation components, including the use of assessment data, outcomes by program, case-level evaluation where appropriate, and service evaluations. We will also ensure that the lived experience of youth and families is lifted through stakeholder engagement and integrated into the performance picture. We focus on selecting metrics that are:

- Aligned with the goals of each funding stream and service area
- Disaggregated by race, ethnicity, gender, and geography to highlight disparities and promote equity
- Grounded in real-time feedback from clients, community-based organizations, and system partners
- Useful for both program-level decision-making and system-wide strategy development

#### Sample Performance Domains

Our evaluation framework typically includes performance measures within the following domains:

- Program Participation: Number of youth served, demographic breakdown, referral and enrollment rates, and program retention

- Service Delivery: Dosage and type of services received, fidelity to evidence-based practices, and timeliness of service access
- Short-Term Outcomes: Improvements in school attendance, reduction in technical violations or reoffending, client-reported gains in skills or wellbeing
- System-Level Indicators: Cross-agency collaboration, referral pathways, reduction in disproportionality, and alignment of resources with identified needs
- Stakeholder Feedback: Satisfaction with services, quality of engagement, and perception of system responsiveness
- General Demographic Context: County and community-level demographic trends to contextualize service delivery and outcomes.

#### **Specific Performance Metrics by Funding Stream**

SCP will work with San Mateo County to establish performance measures aligned with each funding stream's requirements and the County's strategic priorities:

##### ***JJCPA Program Metrics:***

- Recidivism rates at 6,12, and 24 months post-program completion
- School engagement indicators (attendance, credits earned, graduation rates)
- Substance abuse treatment completion and sustained sobriety rates
- Family engagement and satisfaction scores
- Diversion success rates and reduced formal court processing

##### ***YOBG/JJRBG Program Metrics:***

- Institutional length of stay and step-down progression
- Community reintegration success (housing stability, employment/education engagement)
- Technical violation rates and successful supervision completion
- Mental health treatment engagement and progress indicators

- Victim impact and restorative justice participation rates

***System-Level Coordination Metrics:***

- Cross-agency referral completion rates and timeliness
- Duplication reduction across service providers
- Resource leverage ratios (leveraged funding per JJCPA/YOBG dollar)
- Stakeholder satisfaction with coordination and communication
- Equity indicators showing progress in reducing racial/ethnic disparities

***CBO Technical Assistance Metrics:***

- Data submission timeliness and quality scores
- Evidence-based practice fidelity ratings
- Staff training completion and retention rates
- Client outcome improvements year-over-year

**Data Collection and Monitoring**

SCP will coordinate with the County and its contracted CBOs to ensure the collection of high-quality, standardized data. We will develop and deploy surveys as needed to gather both program-specific and system-level insights. We will provide technical assistance on using performance measures for program improvement, not just reporting. Data will be reviewed at regular intervals, including quarterly and annual summaries, and integrated into reports to the Juvenile Justice Coordinating Council and the public.

**Performance Reporting and Use**

Each evaluation report will include analysis of year-over-year performance trends, visualizations of key metrics, and a set of practical recommendations tied directly to the data. Where possible, SCP will benchmark progress against similar jurisdictions and identify best practices that can be adopted locally. We will also facilitate County discussions around data interpretation to support shared ownership of results and collaborative development of solutions.

#### FIRM QUALIFICATIONS \*

Attach information regarding background and qualifications, including the following:

- A brief description of the proposer.
- A description of not more than three (3) projects similar in size and scope conducted by the proposer, including the client, reference and telephone numbers, primary staff members involved, budget, schedule, and project summary. Descriptions should be limited to one (1) page for each project.
- If subcontractors are anticipated, identify them (if known) and provide information on how they will be used.

Social\_Change\_Partners\_RFP\_No\_2025\_RFP\_00559\_Research\_and\_Evaluation\_Services\_Firm\_Qualifications.pdf

#### TEAM QUALIFICATIONS\*

Provide a chart identifying:

- Project team and reporting structure
- Lead project manager
- Role each person will play in the project

Provide a brief description of the experience and qualifications of the project team members, including short resumes if desired.

Written assurance that the key individuals listed and identified will be performing the work and will not be substituted or reassigned without the County's prior approval

Social\_Change\_Partners\_RFP\_No\_2025\_RFP\_00559\_Research\_and\_Evaluation\_Services\_Team\_Qualifications.pdf

#### REFERENCES\*

Provide 2 references for each of the following, including the name, position/title, address, email, and telephone number of recent clients (preferably other public agencies):

Social\_Change\_Partners\_RFP\_No\_2025\_RFP\_00559\_Research\_and\_Evaluation\_Services\_References.pdf

#### FEE PROPOSAL\*

The Fee Proposal should be submitted as a separate PDF file from the Technical Proposals detailed in Required Documents.

The County reserves the right to accept other than the lowest priced offer and to reject any proposals that are not responsive to this request.

Social\_Change\_Partners\_RFP\_No\_2025\_RFP\_00559\_Research\_and\_Evaluation\_Services\_Fee\_Proposal.pdf

### **3.1. Introduction & Executive Summary**



August 12, 2025

San Mateo County Probation Department  
Attn: Yanitxa Albino, Management Analyst  
222 Paul Scannell Drive  
Floor 2/Floor 1  
San Mateo, CA 94402

To Whom It May Concern:

This letter and the enclosed proposal confirm that Social Change Partners, LLC (SCP) is willing, able, and eager to partner with San Mateo County Probation to provide comprehensive research and evaluation services aligned with the County’s strategic and operational goals. Submission of this proposal affirms that SCP has not violated the terms of the RFP and is fully prepared to fulfill the commitments contained herein.

SCP is a mission-driven consultancy with over a decade of experience supporting public agencies and community-based organizations in the design, implementation, and evaluation of effective, equity-centered services for justice-involved youth and families. We have successfully managed over 200 contracts across California and beyond, and bring specific, recent experience leading evaluation, planning, and cross-system coordination for County Probation, Child Welfare, and Human Services departments. SCP’s work emphasizes meaningful stakeholder engagement, transparent data reporting, and actionable recommendations that drive continuous improvement.

We have contracted with San Mateo County Human Services Agency (HSA) since 2022 to lead the development and implementation of its Comprehensive Prevention Plan (CPP) — the document that unlocks new state and federal funding through the Family First Prevention Services Program. We’ve worked across departments—Child Welfare, Behavioral Health, Public Health, and the County Office of Education—to support community engagement, data analysis, planning, and oversight. Through this work we’ve gained deep understanding of local needs, strengths, and context, as well as an array of current local relationships. This experience provides a strong foundation for the proposed scope of work.

This proposal outlines our approach to evaluating County-funded programs, facilitating the development of the 2030–2035 Local Action Plan, producing required annual reports and state plans (JJCPA, YOBG, JJRBG), developing and updating a Resource Guide for youth and

families, and analyzing the impact of Adult and Pretrial Services programs. Our approach prioritizes collaboration, equity, accessibility, and alignment with broader County priorities.

SCP recognizes the value of San Mateo County's existing evaluation work and commits to building on prior investments rather than starting from scratch. Our approach includes:

- Seamless transition planning with careful review of existing data systems, stakeholder relationships, and reporting processes
- Enhanced community engagement that deepens existing relationships while expanding participation to historically underrepresented voices
- Strengthened systems integration that leverages our cross-system planning experience to connect juvenile justice evaluation with broader County initiatives
- Expanded Adult/Pretrial Services evaluation that brings our specialized experience in system evaluation to new service areas

Our fresh perspective combines respect for existing foundations with innovative approaches that can align stakeholders, secure approved plans, build system and contractor capacity, and elevate San Mateo County's evaluation work.

I am authorized to obligate Social Change Partners, LLC to perform all commitments contained in this proposal.

We appreciate the opportunity to submit this proposal and look forward to the possibility of continuing our partnership with San Mateo County in support of improved outcomes for youth, families, and the broader community.

Sincerely,

A handwritten signature in black ink, appearing to read 'Reed Connell', written in a cursive style.

**Reed Connell**

Managing Partner

Social Change Partners, LLC

1450 Taylor Street, # 5

San Francisco, CA 94133

reed@socialchangepartners.com

510-387-7518



### **3.5. Proposed Schedule**

Social Change Partners (SCP) is prepared to begin work immediately upon contract execution and is committed to meeting all deadlines associated with required reports, plans, and public processes. The schedule below outlines our proposed timeline for the first year of work and reflects key milestones. Future years will follow a similar annual rhythm with refinements based on County priorities and evolving needs.

#### **Year 1: Project Launch and Foundational Deliverables**

- **Q1 (November 2025 – January 2026):**
  - **December 15:** Transition assessment complete
  - **January 15:** Updated data collection protocols finalized
  - **January 31:** CBO onboarding sessions complete
  
- **Q2 (February - April 2026):**
  - **February 28:** LAP stakeholder engagement launch
  - **March 31:** YOBG/JRFBG data collection complete
  - **April 15:** Adult Services baseline assessment complete
  
- **Q3 (May - July 2026):**
  - **May 15:** YOBG/JRFBG annual report draft complete
  - **June 30:** LAP draft circulated for review
  - **July 15:** Resource Guide Year 1 edition published
  
- **Q4 (August – October 2026):**
  - **August 31:** JJCPA/JPAF data collection complete
  - **September 30:** All annual reports finalized
  - **October 31:** Year 1 evaluation and Year 2 planning complete

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*(continued next page)*

## **Years 2–5: Ongoing Reporting and Evaluation**

- Repeat annual cycle of reporting (JJCPA, JJRBG, YOBG, JPAF)
- Update LAP if required or provide implementation support
- Update and distribute annual Resource Guide
- Continue Adult and Pretrial Services evaluation based on County priorities
- Maintain regular meeting attendance and technical assistance
- Conduct mid-cycle check-ins with County to review progress, address any adjustments, and update deliverables or focus areas as needed



### **3.8. Firm Qualifications**

#### **Firm Overview**

Social Change Partners, LLC (SCP) is a mission-driven consulting firm founded in 2013 with deep expertise in juvenile justice systems, child welfare, and cross-system coordination. We have successfully supported **over 200 contracts** with public agencies across California and nationwide. Within the past two years, we have contracted with 21 California counties on a range of relevant projects, including planning, program design, data and CQI capacity building, research and evaluation planning, systems coordination, and community engagement.

Our juvenile justice expertise includes extensive experience with **state-mandated reporting requirements** for JJCPA, YOBG, JJRBG, and JPAF funding streams. We have developed Local Action Plans, supported JJCC strategic planning, and evaluated community-based juvenile justice programs across diverse California jurisdictions. **SCP has worked directly with county probation departments in over 15 California counties** on projects including C-CFSR, Comprehensive Prevention Planning, strategic planning, system coordination, and performance measurement initiatives.

Our firm brings **specialized knowledge of:**

- California juvenile justice funding streams and compliance requirements
- Probation department operations and community partnerships
- Evidence-based practice implementation and fidelity monitoring
- Cross-system coordination between probation, child welfare, behavioral health, and education
- Community-based organization technical assistance and capacity building

Our team of six full time staff includes experts in federal and state policy, local planning and program design, research and evaluation, CQI and capacity building, county administration, nonprofit management, and community engagement. The team has relevant work experience in county government, research institutions, nonprofit intermediaries, community-based organizations, legal organizations, philanthropy, and consulting. Two members of our team have lived experience of public systems.

## Relevant Experience

Below are three recent and relevant projects that demonstrate SCP's qualifications to meet the needs of San Mateo County Probation:

### **Project 1: San Mateo County Human Services Agency – Comprehensive Prevention Plan (CPP) and Ongoing Technical Assistance**

- **Client:** San Mateo County Human Services Agency
- **Contact:** John Fong, Children & Family Services Director  
jfong@smcgov.org, 650-802-3390
- **Project Budget:** \$350,000
- **Timeline:** 2022–Present
- **Summary:** SCP led the development of the County's CPP, facilitating cross-agency coordination, analyzing service gaps, and engaging dozens of stakeholders. The project included community engagement with individuals with lived experience, data synthesis, and alignment with FFPSA and CDSS requirements. SCP produced a comprehensive, equity-centered prevention plan that has been adopted by the County and submitted to the State. The CPP includes evaluation frameworks, performance metrics, and sustainability planning that directly parallels the requirements of this RFP. SCP continues to provide training and technical assistance on a range of essential aspects of CPP implementation, including CQI and evaluation planning.

### **Project 2: Placer County Collaborative Multi-Agency Juvenile Justice Plan (CMJJP)**

- **Client:** Placer County Probation Department
- **Contact:** Melanie Esque, Probation Manager—Juvenile Detention Facility  
mesque@placer.ca.gov, 530-886-4856
- **Project Budget:** \$35,000
- **Timeline:** 2023–Present
- **Summary:** SCP led the development of Placer County's Comprehensive juvenile justice strategic plan, facilitating cross-agency coordination between Probation, First 5, County Office of Education, and community partners. The project included stakeholder engagement with justice-involved youth and families, analysis of recidivism data and service gaps, and development of evidence-based intervention strategies. SCP produced a

strategic plan that coordinates resources across multiple funding streams) and establishes performance metrics for collective impact measurement.

### **Project 3: Nevada Department of Health & Human Services – Extended Foster Care and Youth Justice Strategy**

- **Client:** Nevada Department of Health & Human Services, Division of Child & Family Services
- **Contact:** Megan Tingle, Social Services Chief II, Family Programs Office  
mtingle@dcfs.nv.gov, 775-684-4418
- **Project Budget:** \$515,000
- **Timeline:** 2019–Present
- **Summary:** SCP led the development of Nevada’s SB 397 Extended Foster Care program, which serves Probation youth, and is currently contracted to provide training and technical assistance to support the successful implementation of the program, which went live on July 1, 2025. Our work includes evaluating system capacity and program outcomes, providing training to judges and agency staff, identifying funding opportunities, facilitating diverse stakeholder groups (including youth and families), and preparing reports for the legislature and agency leadership.

### **Subcontractors**

SCP may subcontract with the following individuals on an as-needed basis to support final deliverables:

- **Yvonne Day Rodriguez** – Graphic Design
- **Melinda Clemmons** – Copyediting

These subcontractors are experienced in working with SCP and will be engaged only for design and final production tasks.

Their costs are comparable to those of SCP Project Directors and are provided for in the attached total cost proposal.

All core evaluation, planning, and facilitation work will be performed by SCP’s internal team.



### **3.9. Team Qualifications**

Social Change Partners (SCP) brings a seasoned team of consultants with expertise in research and evaluation, strategic planning, community engagement, and cross-system collaboration. Our proposed project team includes professionals with lived experience, deep content knowledge, and a proven track record of working with probation departments, juvenile justice systems, and public agencies across California and beyond.

Below is a summary of the project team, including roles, reporting structure, and key qualifications. All listed team members will remain assigned to this project for the duration of the contract unless otherwise approved by the County.

#### ***Key Team Members: Qualifications and Roles***

- **Reed Connell, MSW – Managing Partner – Project Lead**

Reed brings over 25 years of experience in public systems planning, evaluation, and strategic design. He has led dozens of county-level planning, evaluation, and coordination efforts across California. He leads and oversees all of SCP's current planning, CQI, and evaluation projects, as well as complex technical assistance projects in several large counties and the State of Nevada. Reed will serve as the primary project director and liaison for this engagement, supervising the work of all SCP staff, facilitating high-level engagement and decision-making, and leading the development of all written deliverables,

- **Jessica Haspel, JD – Project Director – Analysis and Writing**

Jessica brings over 25 years of experience in child welfare system planning, advocacy, and evaluation with deep expertise in legal and policy frameworks governing juvenile justice systems. As SCP's Policy Director, she leads complex research and analysis projects, including comprehensive document review, data synthesis, and regulatory compliance assessment. Jessica will support the development of Local Action Plans, ensure alignment with state requirements for JJCPA/YOBG/JJRBG reporting, and provide legal and policy analysis for cross-system coordination initiatives

- **Mitch Findley** – *Project Director – Stakeholder Engagement and Facilitation*

Mitch brings both professional and lived experience within the foster care and justice systems. He has helped design and lead stakeholder engagement, youth-led research projects, and strategic initiatives for over 15 years. He will support facilitation, project management, and partner coordination for San Mateo’s evaluation and planning deliverables.

- **Ashley De Alba** – *Project Director – Data Analysis and Evaluation*

Ashley has over 10 years of experience in research, evaluation, data analysis, CQI, and related training and capacity building. She brings advanced quantitative skills and deep experience in managing large data sets, developing dashboards, and producing digestible, equity-centered data visualizations. She will support data analysis and reporting, evaluation design and implementation, and data and evaluation capacity building.

All team members listed have worked together on past SCP projects with similar scope and deliverables, ensuring an efficient and collaborative internal process. Written assurance is provided that no key team members will be reassigned or substituted without prior County approval.

### Reporting Structure

Managing Partner Reed Connell will serve as the Project Lead/Manager, and supporting staff Jessica Haspel, Mitch Findley, and Ashley De Alba will report directly to him.

<b>Position</b>	<b>Name</b>	<b>Experience</b>	<b>Role</b>	<b>Reports To</b>
Managing Partner	Reed Connell	25 years	Project Management, Facilitation, Writing	N/A
Policy Director - Planning	Jessica Haspel	25 years	Analysis & Writing	Reed Connell
Project Director - Engagement	Mitch Findley	15 years	Stakeholder Engagement & Facilitation	Reed Connell
Project Director - Analytics	Ashley De Alba	10 years	Data & Evaluation	Reed Connell

Managing Partner Reed Connell will serve as primary point of contact for the County, and will lead internal project meetings, monthly workplan reviews, and quarterly progress assessments. Reed will provide the county with same day response for urgent issues



**3.10. References**

**1. John Fong**, Children & Family Services Director  
San Mateo County Human Services Agency  
jfong@smcgov.org, 650-802-3390

*As discussed in this proposal, SCP has contracted with San Mateo County HAS since 2022 to facilitate the development of the county’s state-approved Comprehensive Prevention Plan (CPP) and Child Abuse Prevention Council Strategic Plan. HSA continues to contract with SCP to provide training and technical assistance in support of the implementation of the CPP. These projects involved community-engaged planning, technical assistance regarding evidence-based practices, data collection, CQI, and evaluation.*

**2. Melanie Esque**, Probation Manager—Juvenile Detention Facility  
Placer County Probation Department  
mesque@placer.ca.gov, 530-886-4856

*Social Change Partners has contracted with Placer County Health and Human Services since 2020 on a broad range of projects. Ms. Esque was the Probation representative on several SCP-facilitated planning efforts. At her direction, the Probation Department contracted with SCP to conduct stakeholder engagement and develop the county’s Comprehensive Multi-Agency Juvenile Justice Plan. The SCP-authored plan is currently under final review by leadership prior to submission to the state.*

**3. Shelby Boston**, Director  
Sacramento County Department of Child, Family and Adult Services  
bostons@saccounty.gov, 530-864-1696

*As Director of the Butte County Department of Employment and Social Services, Ms. Boston contracted with Social Change Partners on a range of projects, including the development of Butte County’s Comprehensive Prevention Plan and a Child Welfare System Redesign. Both projects involved collaboration with Probation, community engagement, the development of evaluation frameworks and metrics, and the preparation of plans and reports submitted to local elected officials and state agencies. In early 2025, Shelby transitioned to her current leadership role in Sacramento County and is exploring contracting with SCP there.*



**3.11 Fee Proposal**

**Submitted:** August 12, 2025

**Contract Type:** Time & Materials with Not-to-Exceed Limits by Service Area

**Contract Term:** Five (5) Years (November 2025 - October 2030)

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**FIVE-YEAR SUMMARY**

<b>Service Area</b>	<b>Year 1</b>	<b>Years 2-5 (/yr)</b>	<b>5-Year Total</b>
Juvenile Services	\$200,000	\$120,000	\$680,000
LAP Development	\$40,000	\$5,000	\$60,000
Adult Services	\$20,000	\$11,250	\$65,000
Pretrial Services	\$12,000	\$9,500	\$50,000
<b>TOTAL CONTRACT</b>	<b>\$272,000</b>	<b>\$145,750</b>	<b>\$855,000</b>

**Base Proposal Total (Juvenile Services + LAP): \$740,000**

**Additional Tiered Cost Options (Add-ons):**

- **Adult Services Only:** \$40,000 in Year 1, \$11,250 per year in Years 2-5
  - 5-Year Total: \$65,000
- **Pretrial Services Only:** \$12,000 in Year 1, \$9,500 per year in Years 2-5
  - 5-Year Total: \$50,000
- **Combined Adult & Pretrial:** \$32,000 in Year 1, \$20,750 per year in Years 2-5
  - 5-Year Total: \$115,000

SCP welcomes further discussion of these proposed Total Cost and Tiered Options.

## DETAILED PROPOSAL BY SERVICE AREA

### JUVENILE SERVICES EVALUATION & REPORTING

*Includes: Program evaluation, annual reports (YOBG/JJRBG and JJCPA/JPAF), CBO technical assistance, JJCC presentations*

**Year 1 Budget: \$200,000**

Role	Hours	Rate	Subtotal
Reed Connell (Managing Partner)	320	\$275	\$88,000
Jessica Haspel (Policy Director)	240	\$200	\$48,000
Ashley De Alba (Data & Evaluation)	280	\$150	\$42,000
Mitch Findley (Community Engagement)	147	\$150	\$22,000
<b>Total Labor</b>	<b>987</b>		<b>\$200,000</b>

**Years 2-5 Annual Budget: \$120,000**

Role	Hours	Rate	Subtotal
Reed Connell (Managing Partner)	180	\$275	\$49,500
Jessica Haspel (Policy Director)	130	\$200	\$26,000
Ashley De Alba (Data & Evaluation)	180	\$150	\$27,000
Mitch Findley (Community Engagement)	117	\$150	\$17,500
<b>Total Labor</b>	<b>607</b>		<b>\$120,000</b>

**Scope Justification:**

- **Comprehensive evaluation framework** assessing effectiveness of 12 community-based organizations
- **Community-centered methodology** with stakeholder co-design and participatory research elements
- **Two annual reports** with enhanced data visualization and accessible public-facing formats
- **Ongoing technical assistance** building CBO evaluation capacity and data quality
- **Year 1** transition assessment, protocol development, and enhanced stakeholder engagement

## LOCAL ACTION PLAN DEVELOPMENT (2030-2035)

*Includes: Stakeholder engagement, data analysis, strategic planning, LAP drafting*

### Year 1 Budget: \$40,000

Role	Hours	Rate	Subtotal
Reed Connell (Managing Partner)	80	\$275	\$22,000
Mitch Findley (Community Engagement)	60	\$150	\$9,000
Jessica Haspel (Policy Director)	45	\$200	\$9,000
<b>Total Labor</b>	<b>185</b>		<b>\$40,000</b>

### Years 2-5 Annual Budget: \$5,000 (Implementation support only)

Role	Hours	Rate	Subtotal
Reed Connell (Managing Partner)	8	\$275	\$2,200
Ashley De Alba (Data & Evaluation)	8	\$150	\$1,200
Jessica Haspel (Policy Director)	8	\$200	\$1,600
<b>Total Labor</b>	<b>185</b>		<b>\$5,000</b>

### Scope Justification:

- **Comprehensive 2030-2035 LAP development** with multi-stakeholder engagement process
- **Strategic planning facilitation** with JJCC, probation leadership, and community partners
- **Resource mapping and gap analysis** across all county service areas
- **Community-centered approach** ensuring LAP reflects local priorities and is feasible to implement
- **Minimal ongoing support** for implementation monitoring and minor updates

**ADULT SERVICES EVALUATION (Optional Add-On)**

*Includes: CCP Local Implementation Plan evaluation, outcomes analysis, strategic recommendations*

**Year 1 Budget: \$20,000**

<b>Role</b>	<b>Hours</b>	<b>Rate</b>	<b>Subtotal</b>
Reed Connell (Managing Partner)	35	\$275	\$9,625
Jessica Haspel (Policy Director)	30	\$200	\$6,000
Ashley De Alba (Data & Evaluation)	29	\$150	\$4,375
<b>Total Labor</b>	<b>94</b>		<b>\$20,000</b>

**Years 2-5 Annual Budget: \$11,250**

<b>Role</b>	<b>Hours</b>	<b>Rate</b>	<b>Subtotal</b>
Reed Connell (Managing Partner)	20	\$275	\$5,500
Jessica Haspel (Policy Director)	18	\$200	\$3,600
Ashley De Alba (Data & Evaluation)	14	\$150	\$2,150
<b>Total Labor</b>	<b>52</b>		<b>\$11,250</b>

**Scope Justification:**

- **Annual CCP Implementation Plan evaluation** with comprehensive compliance reporting
- **Performance metrics development** and outcome tracking for adult probation services
- **Cross-system coordination assessment** with behavioral health, social services, and community partners
- **Strategic recommendations** for enhanced service impact, resource allocation, and system improvements
- **December annual reporting** to BSCC with detailed data analysis and trend identification

## PRETRIAL SERVICES EVALUATION *(Optional Add-On)*

*Includes: Pretrial program analysis, court appearance tracking, system performance assessment*

**Year 1 Budget: \$12,000**

<b>Role</b>	<b>Hours</b>	<b>Rate</b>	<b>Subtotal</b>
Reed Connell (Managing Partner)	25	\$275	\$6,875
Jessica Haspel (Policy Director)	18	\$200	\$3,600
Ashley De Alba (Data & Evaluation)	10	\$150	\$1,525
<b>Total Labor</b>	<b>53</b>		<b>\$12,000</b>

**Years 2-5 Annual Budget: \$9,500**

<b>Role</b>	<b>Hours</b>	<b>Rate</b>	<b>Subtotal</b>
Reed Connell (Managing Partner)	18	\$275	\$4,950
Jessica Haspel (Policy Director)	15	\$200	\$3,000
Ashley De Alba (Data & Evaluation)	10	\$150	\$1,550
<b>Total Labor</b>	<b>43</b>		<b>\$9,500</b>

### **Scope Justification:**

- **Comprehensive pretrial services evaluation** including risk assessment tool effectiveness analysis
- **Court appearance rate analysis** with failure-to-appear trend identification and intervention recommendations
- **System integration assessment** with courts, law enforcement, and community service providers
- **Policy and practice recommendations** for improved pretrial outcomes and reduced recidivism
- **Data-driven insights** for optimizing pretrial decision-making and resource allocation

## COST ASSUMPTIONS & INCLUSIONS

### Labor Categories & Qualifications

- **Managing Partner Reed Connell:** 25+ years of experience in project leadership, high-level facilitation, and report writing
- **Policy Director Jessica Haspel:** 25+ years of experience in legal/policy analysis, compliance oversight, and strategic planning
- **Project Director Ashley De Alba:** 10+ years specialized expertise research, evaluation, and data analysis
- **Project Director Mitch Findley:** 15+ years of experience in community engagement, co-planning, and facilitation

### Included Services

- **All required meetings:** Monthly probation staff meetings, quarterly JJCC/CBO meetings, realignment subcommittee participation
  - **Travel within San Mateo County:** No separate travel budget; local travel costs provided for total cost
  - **Finalized deliverables:** All reports formatted for public distribution (accessible) with basic graphics and layout
  - **Data collection tools:** Survey development, focus group protocols, interview guides, standard note-taking rubrics, etc
  - **Technical assistance:** Ongoing CBO support, capacity building, training
- 

## CONTRACT STRUCTURE & PAYMENT TERMS

### Contract Type: Time & Materials with Not-to-Exceed Limits by Service Area

This structure provides maximum flexibility for the County to:

- Adjust priorities between service areas based on emerging needs
- Scale up or down specific components without contract modifications
- Maintain cost control through service area caps
- Respond to changing state requirements or funding availability

### **Payment Schedule:**

- Monthly Invoicing with supporting documentation as requested
- Regular Project Oversight Meetings with verbal reporting
- Quarterly Written Reports detailing progress, needs, recommendations

### **Budget Management:**

- **Monthly budget tracking** and budget to actuals
  - **Early written notification** when services approach 75% of annual allocation
  - **Adherence to County budget/scope modification protocols**
  - **Annual budget rollover option** for unused allocations at County discretion
- 

## **COST JUSTIFICATION & VALUE PROPOSITION**

### **Year 1 Cost Justification**

Year 1 budget reflects intensive planning and plan development work:

- **Comprehensive transition assessment** and system integration
- **Enhanced protocol development** and stakeholder onboarding
- **LAP development** requiring extensive community engagement
- **Baseline data collection** and evaluation framework establishment
- **Cross-system relationship building** across juvenile, adult, and pretrial services

### **Cost Efficiency Measures**

- **Streamlined operations** through existing San Mateo County relationships and established workflows
- **Multi-service integration** creating economies of scale across juvenile, adult, and pretrial evaluations
- **Local presence advantage** minimize travel and lodging expenses
- **Tiered service options** providing budget flexibility and scalable implementation



County of San Mateo

## Probation

John T. Keene, Chief Probation Officer  
400 County Center, Redwood City, CA 94063

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### [THE URBAN INSTITUTE] RESPONSE DOCUMENT REPORT

RFP No. 2025-RFP-00559

[Research and Evaluation Services](#)

RESPONSE DEADLINE: August 12, 2025 at 5:00 pm

Report Generated: Wednesday, August 13, 2025

### The Urban Institute Response

#### CONTACT INFORMATION

**Company:**

The Urban Institute

**Email:**

[dmannka@urban.org](mailto:dmannka@urban.org)

**Contact:**

Danny Mannka

**Address:**

500 L'Enfant Plaza SW  
Washington, DC 20024

**Phone:**

N/A

**Website:**

N/A

**Submission Date:**

Aug 12, 2025 3:20 PM (Pacific Time)

## ADDENDA CONFIRMATION

Addendum #1

*Confirmed Aug 5, 2025 1:37 PM by Danny Mannka*

## QUESTIONNAIRE

### 1. Minimum Qualifications

HAS THE PROPOSER BEEN PROVIDING SIMILAR SERVICES FOR A MINIMUM OF FOUR (4) YEARS WITHIN THE LAST SEVEN (7) YEARS?\*

Yes

DOES THE PROGRAM MANAGER HAVE A MINIMUM OF TWO (2) YEARS OF EXPERIENCE WITHIN THE LAST FIVE (5) YEARS IN MANAGING PROGRAMS OF THIS SIZE?\*

Yes

PLEASE CONFIRM YOUR FIRM IS REGISTERED WITH SYSTEM FOR AWARD MANAGEMENT (SAM)\*

[SAM.gov](https://sam.gov)

Confirmed

WHAT IS THE REGISTERED BUSINESS NAME AND UNIQUE ENTITY ID (UEI) NO.?\*

- UEI number can be obtained by registering your business through SAM.GOV
- Should you be in the process of obtaining your UEI number, please enter the digits '123' temporarily for your response below in order to proceed with proposal. This temporary number should be replaced with the correct registration number for submission of the proposal.

The Urban Institute - VNAYDLRGSKU3

## 2. Procurement Preference for Local Businesses and Local Non-Profits

IS THE PROPOSER A "LOCAL BUSINESS"?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code, a "Local Business" means any for-profit business which has its principal place of business, or is headquartered, in San Mateo County. If this designation applies to the proposer, a self-attestation form must be completed and provided with this response.

Please download the below documents, complete, and upload. If this designation is not applicable, please leave blank.

- [SMC LocalBusiness self-atte...](#)

No response submitted

IS THE PROPOSER A NON-PROFIT?\*

A Non-Profit is defined as a tax-exempt public charity organization (within the meaning of section 501(c)(3) of the Internal Revenue Code) that is formed for purposes other than making a profit, is exempt from paying federal income taxes on the income generated for their exempt purposes.

Yes

IS THE PROPOSER A "LOCAL NON-PROFIT"

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code, a "Local Non-Profit" means a tax-exempt public charity organization (within the meaning of section 501(c)(3) of the Internal Revenue Code) that is formed for purposes other than making a profit, is exempt from paying federal income taxes on the income generated for their exempt purposes, and has its principal place of business, or is headquartered, in San Mateo County. If this designation applies to the proposer, a self-attestation form must be completed and provided with this response.

Please download the below documents, complete, and upload. If this designation is not applicable, please leave blank.

- [SMC LocalBusiness self-atte...](#)

No response submitted

IS THE PROPOSER A LOCAL "SMALL" OR "MICRO" BUSINESS?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code:

“Small Business” means any business which holds a Small Business Certification awarded by the California Office of Small Business and Disabled Veteran Business Enterprise Services (OSDS).

“Micro Business” means any Small Business certified by the OSDS which is automatically designated by the OSDS as a Micro Business due to gross annual receipts falling below the OSDS-designated dollar amount.

If the above designations apply, please provide the OSDS provided Certification ID.

If this designation is not applicable, please leave blank.

No response submitted

IS THE PROPOSER A LOCAL "SMALL" OR "MICRO" NON-PROFIT?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code:

“Small Non-Profit” means a Local Non-Profit with an annual revenue of \$1,000,000 to \$2,500,000 according to its most recently filed IRS Form 990.

“Micro Non-Profit” means a Local Non-Profit with an annual revenue of less than \$1,000,000, according to its most recently filed IRS Form 990.

If the above designations apply, please provide your latest filed IRS form 990. A filing from the last two calendar years is acceptable.

If this designation is not applicable, please leave blank.

No response submitted

### **3. Technical Proposal**

INTRODUCTION AND EXECUTIVE SUMMARY \*

Submit a letter of introduction and executive summary of the proposal. The letter must contain:

- Name, title and contact information (email, phone, and address) for representative of proposer that is responsible for communication related to this RFP.
- Name, title, contact information, and signature of person authorized to obligate firm to perform the commitment contained in the proposal.

Submission of the letter will constitute a representation by proposer that it is willing and able to perform the commitments contained in the proposal and has not violated the terms of this RFP.

RFP\_No.\_2025-RFP-00559\_Urban\_Institute\_Letter\_of\_Intro\_&\_Exec\_Summary.pdf

#### STATEMENT OF MINIMUM QUALIFICATIONS \*

Describe how the proposer meets the minimum qualifications as set forth in **Minimum Qualifications** of this RFP.

Submission of the Minimum Qualifications checklist is not a substitute for providing a detailed written response.

Established as a nonprofit corporation in Washington, DC, in 1968, the Urban Institute (Urban) is nationally recognized as an objective and nonprofit, nonpartisan policy research organization that examines social, economic, and governance issues. Urban has three particular strengths: 1) technical expertise; 2) a commitment to research-informed practical solutions and creative research; and 3) the ability to put complex issues into perspective and share what we have learned. The Justice and Safety Division (JSD) is committed to developing evidence related to the criminal justice system, both juvenile and adult. The Urban Institute, and specifically JSD, has over two decades of experience providing similar justice-focused evaluation and technical assistance services to those requested by the County. The proposed project leadership team has more than 15 years of combined experience providing similar services and managing projects of similar sizes.

#### PROJECT APPROACH\*

This section should correlate to the Scope of Work . Proposer should give a short summary describing how it will perform the relevant work

The Urban Institute is pleased to submit this proposal to the County of San Mateo to serve as an evaluation and technical assistance partner related to probation services. In response to the Scope of Work, Urban proposes a five-year project, with five separate tasks dedicated to (1) project design, (2) evaluation of juvenile services, (3) technical assistance related to juvenile services, (4) evaluation of pretrial and adult services, and (5) deliverables and reporting. The proposed project team has the required expertise in juvenile

justice, community supervision, local research partnerships, and technical assistance to successfully support the County's implementation and improvement of juvenile, pretrial, and adult services.

Urban is a nonprofit research organization founded on one simple idea: to improve lives and strengthen communities, we need practices and policies that work. For more than 50 years, that has been our charge. By equipping changemakers with evidence and solutions, together we can create a future where every person and community has the opportunity and power to thrive. Our experts are committed to following the facts, offering solutions to societal, policy, and organizational challenges that are rooted in rigorous research. We work collaboratively with community partners to respond to needs through appropriate research methods and technical assistance.

The proposed project has three primary goals:

- A. Build upon the planning and evaluation work already completed by the County and its previous research partners, ensuring continuity and leveraging existing insights;
- B. Collaborate with County staff and local stakeholders to identify and prioritize research questions and technical assistance that reflect community needs, operational realities, and policy goals; and
- C. Generate actionable findings and recommendations that not only support the County's decision-making but also offer guidance to other jurisdictions seeking to strengthen their probation practices.

The San Mateo County Probation Department supervises nearly 200 youth through the juvenile services division and over two thousand adults under pretrial or probation supervision. Additionally, over one thousand youth are served by community-based organizations with support from multiple funding sources. These services include mentoring, case management, job readiness training, job placements, counseling, and educational workshops. The County's current research partner has produced annual reports that describe the implementation of these programs through the funding sources. These reports provide helpful information about the demographics and risk factors of the population served, their level of service engagement, and their justice-related outcomes (arrest and probation violations). The reports also share client success stories collected by the service providers and challenges reported by the service providers. Measuring program inputs and outputs, alongside descriptive outcomes, are important for measuring program performance. They also set a foundation for more rigorous evaluation of the programs' effectiveness and impact, which will help the County understand whether these services are actually achieving the desired outcomes for clients.

Urban proposes a robust evaluation coupled with strategic planning support and TA to provide the County the information needed to achieve its goal of improving outcomes across the Juvenile, Adult and Pretrial Services. Urban proposes conducting a survey, interviewing clients and service providers, holding listening sessions with stakeholders, and analyzing programmatic and justice system data. The specific data collection activities and analysis types will be decided in consultation with the County. The project would include a *process evaluation* that systematically examines the implementation successes and challenges. As feasible with the existing data and sample sizes, it would also include an *impact evaluation* to assess whether participation in certain services or programs improves individual-level outcomes. Lastly, *ongoing technical assistance* would be a key component of the project, ensuring that the service provider's implementation and data collection needs are supported.

Urban and the proposed team have extensive experience conducting process and impact evaluations as well as providing technical assistance with county correctional agencies. We work collaboratively to match the appropriate evaluation/TA methods to the needs of the agency. We specialize in rigorous process and impact evaluations, linking data across multiple systems, and accessible data visualization. We also specialize in community-engaged methods that center the people impacted by the criminal legal system, including youth and system-impacted adults themselves, their families/parents, and those who work in juvenile and adult systems. We understand that relationships are key to the success of large projects with multiple agencies, CBOs, and stakeholders. We cultivate strong relationships early on to ensure a clear understanding of county/agency processes to develop strong deliverables. Additionally, Urban has over five years of experience successfully conducting evaluation and technical assistance through hybrid means, with engagement in person and virtual through phone, electronic surveys, and video conference platforms. The proposed co-principal investigators of the project are based in Sonoma County, CA and Reno, NV, and are available for in-person meetings and data collection.

This proposed research design is critical to advancing more responsive and effective services for people directly impacted by the justice system in San Mateo County. By working in close partnership with the County, this project will continue to support responsible government through research-informed decision making, transparency, and accountability. The evaluation will be designed to foster continuous improvement, offering timely, actionable insights that help refine policies and practices. Moreover, the findings will contribute to the broader evidence base, helping not only the County but also other jurisdictions learn from and build upon this work to improve outcomes for justice-involved populations.

#### SCOPE OF WORK TASKS/MILESTONES\*

Describe your proposed approach to tasks/milestones

This section describes the overall task plan to fulfill the project's scope of work. The overall tasks are (1) project design, (2) evaluation of juvenile services, (3) technical assistance related to juvenile services, (4) evaluation of adult and pretrial services, and (5) deliverables and reporting. The project team will finalize the task plan and specific activities in consultation with the County. The project team is open to being selected for certain tasks (e.g., the evaluation of juvenile services or the evaluation of adult and pretrial services). However, there will be operational efficiencies in terms of project design, regular reporting, data processing, and more, by having one research partner for all tasks.

### **Task 1: Project Design**

The project will begin with a design phase to solidify the goals, data collection activities, and timeline.

- *Task 1a. Hold kick-off meeting* with Urban, Probation, and other local stakeholders to discuss the project goals and priorities.
- *Task 1b. Execute a data sharing agreement* between Urban and the County that specifies the data protections, data elements and sharing timeline, and how the data will be used.
- *Task 1c. Develop an evaluation and technical assistance plan* in consultation with the County. Urban will hold multiple conversations with the County and local stakeholders to understand its priorities and data availability in order to develop the most feasible and rigorous research design possible. The plan will include the research questions, technical assistance priorities, data collection activities, and analytical methods.
- *Task 1d. Receive approval from Urban's Institutional Review Board (IRB)*. All data collection activities involving human subjects (e.g., surveys, interviews, sensitive individual data) will undergo review by Urban's IRB to ensure adequate protections for research participants and their data.

### **Task 2: Evaluation of Juvenile Services**

The primary goal of the evaluation of juvenile services is to assess the effectiveness of juvenile programs implemented by contracted community-based organizations.

- *Task 2a. Collect and analyze **quantitative** data* from the community-based organizations receiving JJCPA, JPAF, YOBG, JIRBG, and other funding. After executing a data sharing agreement, we will securely receive the program and probation data. We will then clean and process the data to support analysis. We will produce descriptive statistics on program dosage, demographics, and other relevant outcomes, such as arrest and probation violations.

- *Task 2b. Collect and analyze **qualitative** data* on program strengths and challenges and client experiences. We will design protocols for interviews with service provider staff that cover program implementation, intended and served populations, successes, challenges, partnerships, and recommendations for improvement. We intend to interview at least 1-2 staff from each contracted service provider. We also propose conducting brief interviews with program participants to understand their motivation for participating in the program, referral pathways, service duration and frequency, challenges, and personal impacts. We intend to interview at least 5 participants for each service type. Program participants would receive a gift card as a thank you for their time, and the proposed budget includes an allocation for participant compensation. Parent or guardian consent would be required for all youth 17 or under. The proposed budget includes an allocation for travel to allow the co-principal investigator and one support staff member to hold some interviews in-person, if preferable for participant engagement and comfort.
- *Task 2c: Create additional data collection tools*, such as surveys. In consultation with the Department, we will develop data collection tools that are best suited to the research questions and intended participants. For example, brief participant feedback surveys could be offered at the end of service sessions. Additionally, data collection instruments could be created for service providers to track additional outcomes of interest not available in existing data systems.
- *Task 2d. Evaluate the existing resources available for Juvenile Services.* The review of existing reports, descriptive data analysis, and staff interviews will help us understand the existing services available and their capacity. We will compare this against the level of need and risk among clients and youth in the community more broadly, as measured through probation data and publicly available data (e.g., Census, American Community Survey). We will also consider the level of need reported by provider and probation staff during interviews. This assessment will inform updates to the *Resources Guide for Youth and Their Families*.
- *Task 2e: Assess impact of services on client outcomes.* As feasible with the data and desired by the County, we will conduct an impact analysis to understand whether program participation improves client outcomes. Potential analysis methods include propensity score matching, synthetic controls, and difference-in-difference.

### **Task 3. Technical Assistance Related to Juvenile Services**

The primary goal of this task is to provide support to the service providers to improve service implementation, organizational capacity, and data collection.

- *Task 3a. Provide technical assistance to community-based organizations* on quality data collection, evidence-based assessment tools, and any other topic needs that emerge (e.g., best practices for specific populations). Through the planning phase, descriptive data analyses, and staff interviews, we will learn about the current needs of the contracted service providers. This will inform the development of the plans for technical assistance (TA). The TA will be provided to individual organizations if the topics or questions are unique to them. TA can include trainings/workshops, brief summaries of best practices, tables outlining comparisons of tools/services/programs, group discussions, and any other needed activities. We will also facilitate group sessions that encourage information sharing and peer learning across the contracted CBOs. The frequency of the CBO engagement will depend on their needs and the requirements of the County, and the project team will be prepared to provide multiple engagements per year.
- *Task 3b. Collect information to inform the Local Action Plan (LAP)*. We will facilitate listening sessions with the JJCC, Probation Leadership, and funded CBOs to inform the priority areas for the plan. We will also conduct individual or small groups interviews with stakeholders and service providers across to gain a more in-depth understanding of the goals, needs, existing resources, and recommended strategies for best serving youth and their families in San Mateo County. As desired by the Department, brief surveys could also be conducted to collect feedback from stakeholders and community members. The proposed budget includes an allocation for travel to allow the co-principal investigator and one support staff member to hold some sessions/interviews in-person.

#### **Task 4: Evaluation of Adult and Pretrial Services**

The purpose of the evaluation of adult and pretrial services is to identify the successes and challenges in the services as well as their impact on client outcomes

- *Task 4a. Collect and analyze quantitative data* from Probation on adult and pretrial clients. We will clean and process the data to support descriptive and impact analyses. We will produce descriptive statistics on demographics, supervision terms, supervision compliance, and recidivism. Specifically, we will focus on calculating outcomes identified in the 2020 CCP Local Implementation Plan, including rates of violations, successful completion, failure, arrests, jail bookings, and new convictions (data permitting). We will provide breakdowns of the types of violations and recidivism offenses. We will also calculate other measures of success, such as employment, treatment completion, and access to physical and behavioral health services. The proposed research team has extensive experience processing and combining supervision, jail, court, and program data.

- *Task 4b. Evaluate the existing resources available for Adult and Pretrial Services.* The review of existing reports, descriptive data analysis, and staff interviews will help us understand the existing services available and their capacity. We will compare this against the level of need and risk among clients and adults in the community more broadly, as measured through probation data and publicly available data (e.g., Census, American Community Survey). We will also consider the level of need reported by probation staff during interviews.
- *Task 4c. Evaluate the effectiveness of pretrial services* for individuals accused of violating the law and/or have criminal charges filed against them. We will work with the Probation staff during the design phase to identify research priorities and develop research questions. We will then review the available data sources and select the most appropriate and rigorous analytical methods. Potential topics include examining drivers of failure to appear and other pretrial misconduct, evaluating the effectiveness of specific pretrial policies and programs, and validating a risk assessment tools. We also could assess overall system impacts, such as how realignment or other policies affect the overall population in correctional facilities. The project team has experience conducting evaluations on these topics in multiple jurisdictions across the country.
- *Task 4d. Develop the Community Corrections Partnership (CCP) Local Implementation Plan.* The plan will be informed by the data analysis, resource assessment, and impact evaluation. The plan will report on progress towards outcome measures and how funds should be allocated in the future.

### **Task 5: Deliverables and Reporting**

The primary goal of the deliverables and reporting task is to allow for regular collaboration, provide timely information back to the County and local stakeholders, and publish actionable reports. As applicable for each report or plan, we will provide preliminary findings and drafts for review, assist in discussion and planning calls, identify experts to provide insight if needed, and work collaboratively across agencies and stakeholders.

- *Task 5a. Produce annual reports for YOBG/JJRBG and JJCP/JPAF* and prepare presentation materials for the Juvenile Justice Coordinating Council.
- *Task 5b. Assist in developing the annual JJRBG Plan and JJCPA/YOBG Plan.* The JJRBG Plan will describe services and programs for youth with serious offenses.

The JJCPA/YOBG Plan will describe the programs, placements, strategies, services, and system enhancements supported by the funds. The stakeholder interviews, descriptive data analysis, and technical assistance will help inform these plans. The project team will prepare memos with the desired analyses and summary of findings for the County to support their revisions to the plans.

- *Task 5c. Update Probation’s Resources Guide for Youth and Their Families* annually, with the most recent information available and relevant findings from the project. We will ensure the guide is accessible by providing English and Spanish versions and using language at the appropriate reading level.
- *Task 5d. Develop CCP Local Implementation Plan.* The descriptive data analysis and staff interviews will support revisions to the plan. Additionally, the project team can support revisions to the logic model and process flows.
- *Task 5e. Develop the Local Action Plan for Juvenile Services.* The report will summarize progress toward the intended outcomes and recommendations for adjusting services to help achieve those outcomes.
- *Task 5f. Hold regular meetings with Probation staff.* These meetings will help facilitate collaboration and troubleshooting challenges as they arise. We will share preliminary and interim findings to gain insight from staff on how to interpret the findings. We will also gain staff insight on TA needs and priorities.
- *Task 5g. Attend specific quarterly and semi-annual meetings.* The proposed budget includes an allocation for local travel that would allow the co-principal investigators to attend some meetings in-person. The project team would also attend the quarterly JJCC, quarterly CBO, and semi-annual Realignment Subcommittee JJCC meetings virtually.

#### PROPOSED SCHEDULE \*

Attach proposed schedule reference ability to complete the project within the County's required time frame

RFP\_No.\_2025-RFP-00559\_Urban\_Institute\_Schedule.pdf

#### INNOVATIONS\*

Refence any notable innovations or improvements that you expect to provide (with respect to, for example, efficiency, technology, sustainability)

The research design will build on existing reports completed by the County and its past research partner, integrating prior findings and lessons learned to avoid duplication and enhance efficiency. Additionally, the project will draw from established evidence and best

practices in probation and community supervision research to ensure streamlined implementation and meaningful contributions to the field. To promote transparency, efficiency, and replicability, the final data processing and analysis code developed for this project will be shared via a repository, with clear documentation to facilitate reuse and adaptation, if desired by the County. Community engagement methods (e.g., outreach strategies, listening sessions, feedback mechanisms, and participatory action research tools) will be systematically documented in a replicable format, allowing the County to adopt or adapt these approaches going forward.

#### PERFORMANCE MEASURES\*

Describe a plan for achieving performance measures

To ensure steady progress toward the project's performance measures, we will implement a structured project management approach. The primary performance measures will relate to progress on data collection, analysis, technical assistance, and reporting. The approach includes regular internal team meetings to monitor task completion and troubleshoot any emerging challenges. Specific metrics such as the number of interviews completed, surveys administered, listening sessions held, and engagements with the CBOs will be tracked systematically. In addition, we will hold recurring coordination meetings with Probation staff to review progress, align priorities, and make any necessary adjustments to the timeline or approach. This collaborative and transparent process will help ensure that all performance goals are met efficiently and effectively.

#### FIRM QUALIFICATIONS \*

Attach information regarding background and qualifications, including the following:

- A brief description of the proposer.
- A description of not more than three (3) projects similar in size and scope conducted by the proposer, including the client, reference and telephone numbers, primary staff members involved, budget, schedule, and project summary. Descriptions should be limited to one (1) page for each project.
- If subcontractors are anticipated, identify them (if known) and provide information on how they will be used.

RFP\_No.\_2025-RFP-00559\_Urban\_Institute\_Firm\_Qualifications.pdf

#### TEAM QUALIFICATIONS\*

Provide a chart identifying:

- Project team and reporting structure
- Lead project manager
- Role each person will play in the project

Provide a brief description of the experience and qualifications of the project team members, including short resumes if desired.

Written assurance that the key individuals listed and identified will be performing the work and will not be substituted or reassigned without the County's prior approval

RFP\_No.\_2025-RFP-00559\_Urban\_Institute\_Team\_Qualifications.pdf

#### REFERENCES\*

Provide 2 references for each of the following, including the name, position/title, address, email, and telephone number of recent clients (preferably other public agencies):

RFP\_No.\_2025-RFP-00559\_Urban\_Institute\_References.pdf

#### FEE PROPOSAL\*

The Fee Proposal should be submitted as a separate PDF file from the Technical Proposals detailed in Required Documents.

The County reserves the right to accept other than the lowest priced offer and to reject any proposals that are not responsive to this request.

RFP\_No.\_2025-RFP-00559\_Urban\_Institute\_Fee\_Proposal.pdf



# Evaluation and Technical Assistance for San Mateo County Probation

RFP No. 2025-RFP-00559

*For Submission to the County of San Mateo*

*Urban Proposal Number 1701-000-01286*

*August 12, 2025*

**Communication Representative:**

Danny Mannka, Senior Project Manager

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(203) 400-4898

500 L'Enfant Plaza SW, Washington, DC 20024

**Authorizing Official:**

Christopher Thomas, Senior Contracts Administrator

CThomas@urban.org

(202) 261-5237

DocuSigned by:  
*Christopher Thomas*  
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### **3.2 Executive Summary**

The Urban Institute (Urban), a nonprofit research organization with a strong focus on justice systems research, proposes a comprehensive five-year project to support San Mateo County's probation services through evaluation, technical assistance, and reporting. The project encompasses five key tasks: project design, juvenile services evaluation, juvenile services technical assistance, adult and pretrial services evaluation, and deliverables and reporting. Urban will leverage community partnerships and existing data to conduct rigorous process and outcome evaluations, including quantitative and qualitative data collection from service providers and clients. The approach will emphasize collaboration with County staff and local stakeholders to ensure research questions and technical assistance align with local needs and policy goals. The proposed research team possesses extensive expertise in justice program evaluation and technical assistance, combining strong skills in data analysis, mixed methods research, community-engaged methods, and collaboration with justice agencies and community-based organizations. The deliverables will include annual reports, updated resource guides, and implementation plans designed to identify improvements in current practices and services. Project innovations will include sharing data processing code for transparency and replicability, as well as systematic documentation of community engagement methods. A structured project management plan will track performance measures to ensure timely progress and proactively address challenges as they arise. With its deep expertise, collaborative approach, and track record in justice systems research, Urban is uniquely positioned to deliver actionable research and technical assistance that will strengthen San Mateo County's probation services and contribute to lasting improvements in outcomes for justice-involved youth and adults.

### 3.5 Proposed Schedule

The project will be organized across 5 tasks, shown in the task timeline (figure 1). With the five-year timeline, the project team will be able to complete the deliverable and reporting requirements within the required timeframe.

Figure 1. Task Timeline

	2026				2027				2028				2029				2030			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>Project design</b>																				
Kick-off meeting																				
Execute data sharing agreement																				
Develop evaluation design plan																				
IRB approval and renewal																				
<b>Juvenile services evaluation</b>																				
Collect data from CBOs																				
Analyze data from CBOs																				
Administer survey																				
Conduct interviews with staff																				
Conduct interviews with participants																				
Analyze qualitative data																				
Assess existing resources and services																				
<b>Juvenile services training and technical assistance</b>																				
Provide TTA to CBOs																				
Hold listening sessions																				
Conduct interviews																				
Analyze data																				
<b>Adult &amp; Pretrial services evaluation</b>																				
Collect administrative data																				

	2026				2027				2028				2029				2030			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Analyze quantitative data																				
Conduct interviews with stakeholders																				
Gather input from people on supervision																				
Analyze qualitative data																				
Assess existing resources and services																				
Present findings																				
Prepare report																				
<b>Deliverables and Reporting</b>																				
YOBG/JJRBG Annual Report				D				D				D				D				D
JJCPA/JPAF Annual Report				D				D				D				D				D
Local Action Plan for Juvenile Services																			D	
JJRBG Plan		D				D				D				D				D		
Update Resources Guide for Youth and Their Families				D				D				D				D				D
CCP Implementation Plan				D								D								D
Regular meetings with Probation																				
Meetings with JJCC, realignment subcommittee, and CBOs																				

“D” indicates a deliverable will be completed and submitted in that quarter.

### 3.8 Firm Qualifications

#### About the Urban Institute

Established in 1968, the Urban Institute is nationally recognized as an objective and nonpartisan, nonprofit research organization that examines social and economic policy issues. Urban offers technical expertise; a commitment to practical solutions and creative research; and the ability to put complex issues into perspective and share lessons. With over 500 staff representing an array of academic disciplines, Urban has the staff capacity to successfully undertake many complex research projects simultaneously and under tight time constraints, and to engage expertise across a wide range of data sources and subject matter as needed.

The Justice and Safety Division (JSD) is dedicated to developing evidence related to justice challenges and has extensive experience implementing projects of similar magnitude and design as the one proposed here. We conduct objective, rigorous, interdisciplinary research, evaluation, and policy analysis and deliver data-driven recommendations, training, and technical assistance. In carrying out our research, we seek to center the voices, experiences, and perspectives of the people, practitioners, and communities most affected by crime and the justice system. JSD has worked with a variety of partners to build a strong portfolio of accessible research on ways to support and publicly-fund community-driven safety strategies and has a track record of translating research for policy and practitioner audiences.

Specifically, Urban and JSD bring experience in multiple projects based in California as well as a broad understanding of practices and innovations nationwide in juvenile justice, community supervision, and violence prevention. Urban also has deep expertise in rigorous evaluation, action-research partnerships, and technical assistance, which will be critical to the successful implementation of the proposed project. Regarding national expertise, Urban provided technical assistance to 32 local jurisdictions regarding strategies to reduce their jail population and improve community supervision. More information on the work in one jurisdiction, East Baton Rouge, is described below. Regarding experience in California, Urban has had justice-focused projects in Contra Costa County, Los Angeles, Oakland (described below), Orange County, San Francisco, and more. Lastly, JSD has decades of research experience in juvenile justice, from the implementation of evidence-based reforms to practice guides to prevent youth gun violence. More information about a current project on reducing youth incarceration is provided below.

#### Relevant Projects

##### *Oakland Measure Z Evaluation*

Urban conducted an evaluation of the services funded through Public Safety and Services Violence Prevention Act (Measure Z), passed in 2014 in Oakland, California. Urban conducted a process and impact evaluation of Measure Z strategies implemented by the Oakland Police Department (OPD) and Oakland Department of Violence Prevention (DVP) from July 2022 to June 2025. The Measure Z–funded services have two main parts: (1) violence prevention and

intervention strategies operated by the DVP and a network of community-based organizations, and (2) geographic, special-victims, and community-policing services implemented by the OPD. The strategies operated by the DVP and implemented by local organizations focus on preventing and serving people affected by group and gender-based violence, promoting community healing and restoration, and preventing violence in schools.

The evaluation described the services provided under Measure Z, the quality of those services, and how they affect levels of violence at the individual and community levels. This evaluation involved analyzing administrative data, interviewing staff from the city agencies and community-based organizations, reviewing program documents, observing neighborhood meetings and events, interviewing program participants, and conducting a survey of Oakland residents. To support data collection, Urban subcontracted with Urban Strategies Council, a local research organization based in Oakland.

The project required regular meetings and frequent input from the DVP and OPD. The project received guidance from a Community Advisory Board, composed of Oakland community members. The project team presented multiple times at local meetings of the oversight commission for Measure Z. The project resulted in a public data dashboard on the service implementation on the DVP's website and reports on each violence prevention strategy. For more information about the project and to read the evaluation reports, see the project page available at: [An Evaluation of Violence Prevention in Oakland, California | Urban Institute](#)

- Clients: Oakland Police Department, Oakland Department of Violence Prevention
- Funder: City of Oakland
- Budget: \$1,819,798
- Schedule: August 2022 – July 2025
- Primary Urban Staff: Jesse Jannetta, Ashlin Oglesby-Neal, KiDeuk Kim, and Sam Tecotzky

### *East Baton Rouge: Safety and Justice Challenge*

Over the past several years, Urban has provided technical assistance to East Baton Rouge Parish (EBR) through the MacArthur Foundation's Safety and Justice Challenge, supporting the parish's efforts to reduce its jail population and advance criminal justice reform. The technical assistance has included monthly reviews and discussion about the jail's data, providing feedback on the design of re-entry programs and specialty courts, and giving recommendations related to data centralization. Urban also led process mapping with local stakeholders to identify potential system-level changes and improvements.

With support from Urban throughout the initiative, EBR achieved many of its reform goals, including launching the East Baton Rouge Criminal Justice Coordinating Council (CJCC), establishing a pretrial supervision program, adopting a pretrial risk assessment, and establishing a community engagement subcommittee. Urban co-led the Louisiana Network for Criminal Justice with other national organizations to strengthen coordination between EBR, New Orleans, and other parishes in the state working on criminal legal system reform. Over the course of the initiative, EBR achieved a more than 33% reduction in its jail population. Urban also helped the site respond to legislative rollbacks and administrative changes at the state and parish levels, and

assisted in identifying funding sources to sustain its work beyond the SJC. For more information on how EBR reduced its jail population, see the case study linked here: [Using Cross-System Collaboration to Reduce the Use of Jails | Urban Institute](#)

- Client: East Baton Rouge Criminal Justice Coordinating Council
- Funder: John D. and Catherine T. MacArthur Foundation
- Budget: \$331,000
- Schedule: 2020 – 2025
- Primary Urban Staff: Jesse Jannetta, Evelyn McCoy, Mary Hayford, and Storm Ervin

#### *Idaho Department of Juvenile Corrections: Reducing Youth Incarceration for Runaway and Truancy*

With funding from the Department of Justice’s National Institute of Justice, the Urban Institute (Urban), in partnership with the National Center for Juvenile and Family Court Judges (NCJFCJ) and the National Association of Court Managers (NACM) is conducting a national scan of practice and case studies/evaluability assessments with sites that implemented promising and innovative approaches to deinstitutionalization of status offenses. Through analyses of state three-year plans, interviews with state representatives, and national surveys with juvenile justice staff, the national scan documents how local communities implement policies, practices, and programs to reduce justice system contact for truancy and runaway status offenses, including strategies to comply with deinstitutionalization of status offenses (DSO) requirements for the Office of Juvenile Justice and Delinquency Prevention (OJJDP) Formula Grants Program. In addition, the case studies/evaluability assessments use interviews with staff and interest holders, document review, and focus groups with parents/staff to demonstrate the barriers and facilitators of implementation and how the innovative approach works to reduce incarceration for status offenses. Urban is working collaboratively with Idaho Juvenile Services to highlight youth assessment centers across the state.

- Client: Idaho Juvenile Services: Ada and Bannock Counties
- Funder: National Institute of Justice
- Budget: \$705,856
- Schedule: 2022 – 2025
- Primary Urban Staff: Lily Robin, Bree Boppre, Susan Nembhard, Russell Rowe, and Sam Bachman

#### **Subcontractors**

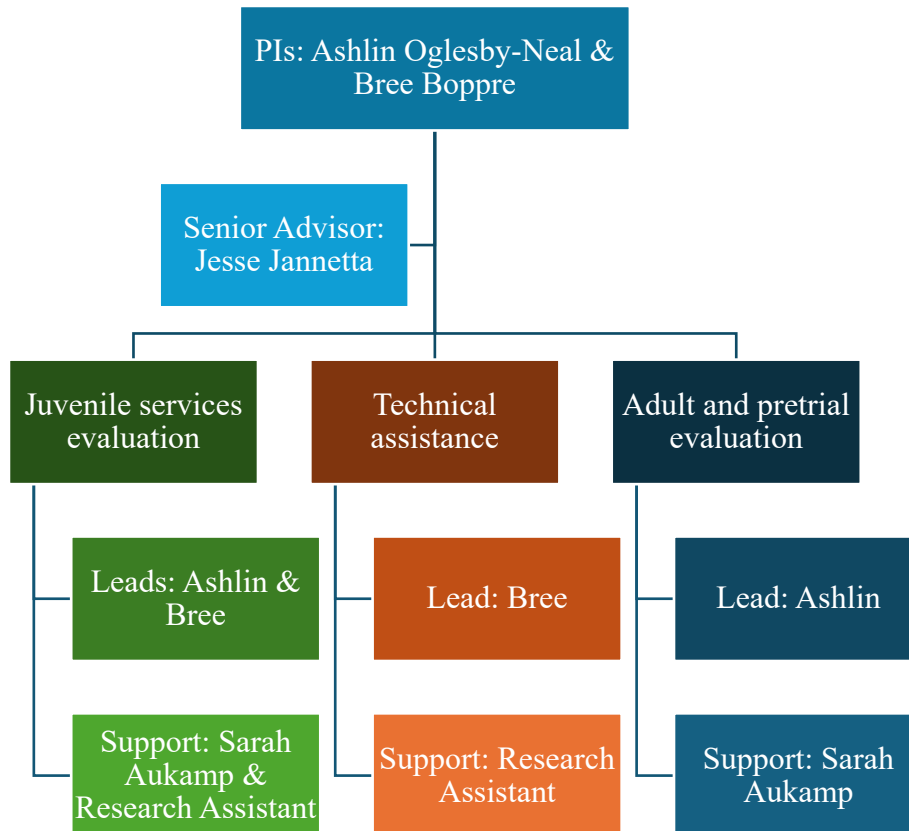
Presently, the Urban Institute research team has not proposed a subcontractor for the project. If the need arises for an organization with complementary skills to Urban during the contract negotiation or project design phase, Urban is open to working with subcontractors. For example, during the Measure Z Evaluation, Urban had a subcontract with a local research partner based in Oakland that facilitated extensive in-person data collection and maintained a community advisory board. Potential partners for this project could come from local community colleges/universities or research organizations.

### 3.9 Team Qualifications

#### Project Organization

Figure 1 provides an overview of the organizational structure for the proposed project. The project will be led by Ashlin Oglesby-Neal, MS, and Breanna (Bree) Boppre, PhD. They will provide oversight and project management across all tasks. Oglesby-Neal and Boppre will co-lead the project design, evaluation of juvenile services, and deliverables and reporting. Boppre will lead the technical assistance related to juvenile services and Oglesby-Neal will lead the evaluation of adult and pretrial services. Jesse Jannetta, MPP, will serve as a senior advisor, providing guidance across all tasks. The project will be supported by Sarah Aukamp, MPP, and a research assistant. The key project staff, Oglesby-Neal and Boppre, will be performing the work and will not be substituted or reassigned without the County’s prior approval.

Figure 1. Project Organization Chart



## Staff Biographies

**Ashlin Oglesby-Neal** is a senior research associate in the Urban Institute's Justice and Safety Division. Her research includes evaluating the impacts of criminal justice programs and policies and developing and validating risk assessment tools. She has designed and managed multiple process and outcome evaluations with criminal justice agencies and service providers at the state and local level. Oglesby-Neal has extensive experience with all types of criminal justice data and collaborating with system stakeholders. Her analytic capabilities include multi-site data processing and management, causal analyses, psychometric validation, and data visualization. To date, Oglesby-Neal has received approximately \$2 million in funding for research and evaluation from federal, state, and local agencies, as well as corporations. Oglesby-Neal volunteered as a police officer with the Metropolitan Police Department in DC. Oglesby-Neal received a master's degree in criminology from the University of Pennsylvania. Oglesby-Neal is based in Sonoma County, CA, and is available for in-person meetings and data collection in San Mateo County.

Oglesby-Neal has specific project leadership and evaluation experience similar to the proposed project. She led the descriptive and impact evaluation of multiple programs under the Oakland (CA) Department of Violence Prevention, including place-based impacts of large community-building events and person-level impacts of participation in life coaching and school-based programs. These analyses required linking service provider, police, probation, and school district data. She also led the process evaluation of the gender-based violence services, which required developing relationships with nearly a dozen CBOs and conducting interviews with their staff and clients. Additionally, Oglesby-Neal conducted a qualitative evaluation of the impacts of a community-based violence reduction collaboration of seven local CBOs in west Baltimore (MD) through stakeholder interviews and participant surveys. Oglesby-Neal currently is the principal investigator of a study funded by the National Institute of Justice to estimate the prevalence of co-occurring mental health and substance use disorders among youth involved in the juvenile justice system, which requires partnerships with three state juvenile justice agencies. She has conducted multiple process and impact evaluations of community supervision policies and programs, including in Georgia, Louisiana, Oregon, Missouri, Nebraska, North Carolina, Utah, and Washington, DC. Oglesby-Neal also participated in an evaluation of juvenile justice programs in Virginia and published an article in *Youth Violence and Juvenile Justice* that examined racial disparities at multiple decision points in the deep end of their system.

**Breanna (Bree) Boppre** is a senior research associate in the Justice and Safety Division. With over 10 years of applied research experience, Dr. Boppre has led several mixed methods evaluation studies focused on community corrections and youth programs. Most relatedly, she co-led annual evaluations for Sedwick County's (Kansas) community corrections 2018-2020 focused on juvenile field services, adult intensive supervision and drug court using secondary administrative data analysis, client surveys and focus groups, as well as interviews with staff. She has authored over 50 publications including 22 peer-reviewed journal articles in top outlets such as *Justice Quarterly*, *Crime & Delinquency*, and *Criminal Justice and Behavior*. She has been nationally recognized for her scholarship on women and mothers impacted by the criminal legal system as the American Society of Criminology Division of Feminist Criminology New Scholar Awardee and Western Society of Criminology Meda Chesney-Lind Awardee.

Currently at Urban, Dr. Boppre co-leads multiple mixed methods studies funded by the National Institute of Justice evaluating youth programs and policies. She also co-leads the

[Catalyst Grant Program](#) providing technical assistance to nonprofit organizations using data and technology to support front-end reforms to the criminal legal system to address racial inequities. Prior to joining Urban, Dr. Boppre worked in higher education as an award-winning faculty member. She continues to teach criminology and criminal justice courses as an adjunct professor for her alma mater Portland State University.

Dr. Boppre uses her expertise in teaching to adult learners by creating engaging trainings and technical assistance to correctional staff. She has provided numerous trainings and technical assistance to correctional agencies across the U.S., including Nevada, Oregon, Idaho, Kansas, Oklahoma, Connecticut, and Texas. Recently, she was invited to provide a mainstage workshop at the American Probation and Parole Association (APPA) winter training institute in Las Vegas, NV. Boppre is based in Reno, NV and is available for some in-person meetings, as needed.

**Jesse Jannetta** is a senior fellow in the Justice and Safety Division and has policy, research, evaluation and technical assistance experience addressing issues related to community anti-violence initiatives, prison and jail reentry, decarceration strategies, police-community relations, parole and probation supervision, and risk prediction. He serves as the co-principal investigator for the Community Violence Intervention and Prevention Initiative (CVIPI) Research and Evaluation TTA Center (funded by the National Institute of Justice), project director for the Safety and Justice Challenge Innovation Fund (funded by the MacArthur Foundation), co-principal investigator for the evaluation of Oakland’s Measure Z-funded violence reduction strategies, and a member of the leadership team for the Prison Research and Innovation Initiative (funded by Arnold Ventures). He has led the Transition from Jail to Community Initiative (funded by the National Institute of Corrections), and served as co-principal investigator for the Developing a Research-Based Practice Guide to Prevent Youth Gun and Gang Violence (funded by the National Institute of Justice), principal investigator for the Evaluation of Procedural Justice in Probation project (funded by Arnold Ventures) He also co-led the Connecting Criminal Justice and Health Initiative (funded by the Bureau of Justice Assistance), the evaluation of the Chicago Violence Reduction Strategy (funded by the MacArthur Foundation), and the Public Safety Risk Assessment Clearinghouse project (funded by the Bureau of Justice Assistance).

Prior to coming to the Urban Institute, Mr. Jannetta was the Research Specialist at the Center for Evidence-Based Corrections at the University of California, Irvine. In this role, he conducted projects including an evaluation of GPS monitoring for sex offender parolees, an analysis of parole discharge and violation response policies, an analysis of the role of the Division of Juvenile Justice in the California juvenile justice system, measuring the scope of correctional control in California, and the assessment of inmate and parolee programs in terms of evidence-based program design principles.

**Sarah Aukamp** is a research analyst in the Justice and Safety Division at the Urban Institute. She contributes to various projects relating to juvenile justice, human trafficking, pre-trial populations, community supervision, and criminal case processing. Before joining Urban, Aukamp served as a policy intern for the Virginia Association of Recovery Residences, where she researched legislation and policies surrounding recovery housing. She also served as research assistant on a project examining the spread of COVID-19 among incarcerated populations, and the use of no-knock warrants in Virginia. Aukamp holds a BS in Community and Justice studies from Guilford College and an MPP from The College of William & Mary.

### 3.10 References

#### Oakland Measure Z Evaluation

- Oakland Department of Violence Prevention
  - Caitlin Grey, *Planner, Data and Evaluation*
  - [cgrey@oaklandca.gov](mailto:cgrey@oaklandca.gov)
- Oakland Police Department
  - James Beere, *Assistant Chief*
  - [JBeere@oaklandca.gov](mailto:JBeere@oaklandca.gov)
  - 455 7th St, Oakland, CA, 94607
- Oakland City Administrator's Office
  - Tonya Gilmore, *Assistant to the City Administrator*
  - [tgilmore@oaklandca.gov](mailto:tgilmore@oaklandca.gov) (510) 238-7587
  - 1 Frank H. Ogawa Plaza, Oakland, CA 94612

#### East Baton Rouge Parish Safety & Justice Challenge Partnership

- East Baton Rouge Criminal Justice Coordinating Council
  - Christopher Csonka, *Executive Director*
  - [ccsonka@ebrjcc.org](mailto:ccsonka@ebrjcc.org) (225) 381-7098
  - 100 Lafayette St, Rm B248, Baton Rouge, LA 70801

**Evaluation & Strategic Planning for San Mateo County Probation  
Prop Development Number: 1701-01286  
BUDGET ESTIMATE  
Prepared for San Mateo County, California**

Object Classification	Juvenile Evaluation		Juvenile TTA		Adult Services		Pretrial Services		Total Estimated	
	Task 1		Task 2		Task 3		Task 4		Total Estimated	
	Hours	Dollars	Hours	Dollars	Hours	Dollars	Hours	Dollars	Hours	Dollars
<b>ON-SITE PERSONNEL</b>										
Ashlin Oglesby-Neal	360	\$78,851	100	\$21,956	320	\$70,675	220	\$48,720	1,000	\$220,202
Jesse Jannetta	18	6,585	18	6,585	14	5,227	14	5,227	64	23,624
Bree Boppre	340	81,952	660	159,116	0	0	0	0	1,000	241,068
Sarah Aukamp	680	71,411	0	0	340	36,007	280	29,664	1,300	137,082
Research Assistant	740	63,566	740	63,566	0	0	0	0	1,480	127,132
Editorial and Publication Support	27	3,781	27	3,707	12	1,648	11	1,524	77	10,660
Project Management Support	198	32,811	156	25,767	68	11,220	52	8,643	474	78,441
Subtotal	2,363	338,957	1,701	280,697	754	124,777	577	93,778	5,395	838,209
<b>TRAVEL</b>										
<b>Round-trip Airfare: WDC/</b>	<b>San Francisco, CA</b>	<b>Cost \$800</b>	<b>No. 5</b>	<b>4,000</b>	<b>No. 0</b>	<b>0</b>	<b>No. 0</b>	<b>0</b>	<b>No. 5</b>	<b>\$4,000</b>
<b>Trip Duration:</b>	3 day(s)/trip		2	night(s)/trip	0	0	0	0	10	150
Transfers @		15	2	/trip	0	0	0	0	0	0
Per Diem:			0	0	0	0	0	0	0	0
Lodging @	2 night(s)/trip	183	10	1,830	0	0	0	0	10	1,830
Lodging Tax @	15%			275	0	0	0	0		275
M&IE @	2.50 day(s)/trip	86	12.50	1,075	0.00	0	0.00	0	12.50	1,075
Car Rental & Related @	3 day(s)/trip	55	15	825	0	0	0	0	15	825
Inflation Factor on Travel*				764	0	0	0	0		764
Subtotal				8,919	0	0	0	0		8,919
<b>OTHER DIRECT COSTS</b>										
Computer Network Services		11,820		8,520		3,780		2,890		27,010
Print and Online Resources		50		50		0		0		100
Meeting and Office Services		420		280		160		120		980
Participant Compensation		2,700		0		0		0		2,700
Local Travel		1,575		1,650		0		0		3,225
Inflation Factor on ODCs (excl Sub. Admin)*		1,533		993		377		292		3,195
Subtotal		18,098		11,493		4,317		3,302		37,210
Total Direct and Indirect Costs		\$365,974		\$292,190		\$129,094		\$97,080		\$884,338
<b>G&amp;A, Consultants, Travel, and Other Direct Costs</b>		6,078		2,586		971		743		10,378
Total Estimated Cost		372,052		294,776		130,065		97,823		894,716
<b>Fee on G&amp;A, Consultants, Travel, Other Direct Costs and Subs</b>	7.00%	2,317		986		371		283		3,957
<b>TOTAL ESTIMATED COST PLUS FIXED FEE</b>		<b>\$374,369</b>		<b>\$295,762</b>		<b>\$130,436</b>		<b>\$98,106</b>		<b>898,673</b>



County of San Mateo

## Probation

John T. Keene, Chief Probation Officer  
400 County Center, Redwood City, CA 94063

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### [TRIWEST GROUP LLC] RESPONSE DOCUMENT REPORT

RFP No. 2025-RFP-00559

Research and Evaluation Services

RESPONSE DEADLINE: August 12, 2025 at 5:00 pm

Report Generated: Wednesday, August 13, 2025

### TriWest Group LLC Response

#### CONTACT INFORMATION

**Company:**

TriWest Group LLC

**Email:**

twgrfp@triwestgroup.net

**Contact:**

Deb Evans

**Address:**

4450 Arapahoe Avenue  
Suite 100  
Boulder, CO 80303

**Phone:**

(303) 544-0509 Ext: 8

**Website:**

[www.triwestgroup.net](http://www.triwestgroup.net)

**Submission Date:**

Aug 12, 2025 4:24 PM (Pacific Time)

## ADDENDA CONFIRMATION

Addendum #1

*Confirmed Aug 4, 2025 2:02 PM by Deb Evans*

## QUESTIONNAIRE

### 1. Minimum Qualifications

HAS THE PROPOSER BEEN PROVIDING SIMILAR SERVICES FOR A MINIMUM OF FOUR (4) YEARS WITHIN THE LAST SEVEN (7) YEARS?\*

Yes

DOES THE PROGRAM MANAGER HAVE A MINIMUM OF TWO (2) YEARS OF EXPERIENCE WITHIN THE LAST FIVE (5) YEARS IN MANAGING PROGRAMS OF THIS SIZE?\*

Yes

PLEASE CONFIRM YOUR FIRM IS REGISTERED WITH SYSTEM FOR AWARD MANAGEMENT (SAM)\*

[SAM.gov](https://sam.gov)

Confirmed

WHAT IS THE REGISTERED BUSINESS NAME AND UNIQUE ENTITY ID (UEI) NO.?\*

- UEI number can be obtained by registering your business through SAM.GOV
- Should you be in the process of obtaining your UEI number, please enter the digits '123' temporarily for your response below in order to proceed with proposal. This temporary number should be replaced with the correct registration number for submission of the proposal.

Legal Name: TRIWEST GROUP, LLC Doing business as: TRIWEST GROUP LLC Unique Entity ID (UEI): CV6HP5SDM1P3

## 2. Procurement Preference for Local Businesses and Local Non-Profits

IS THE PROPOSER A "LOCAL BUSINESS"?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code, a "Local Business" means any for-profit business which has its principal place of business, or is headquartered, in San Mateo County. If this designation applies to the proposer, a self-attestation form must be completed and provided with this response.

Please download the below documents, complete, and upload. If this designation is not applicable, please leave blank.

- [SMC LocalBusiness self-atte...](#)

No response submitted

IS THE PROPOSER A NON-PROFIT?\*

A Non-Profit is defined as a tax-exempt public charity organization (within the meaning of section 501(c)(3) of the Internal Revenue Code) that is formed for purposes other than making a profit, is exempt from paying federal income taxes on the income generated for their exempt purposes.

No

IS THE PROPOSER A LOCAL "SMALL" OR "MICRO" BUSINESS?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code:

"Small Business" means any business which holds a Small Business Certification awarded by the California Office of Small Business and Disabled Veteran Business Enterprise Services (OSDS).

"Micro Business" means any Small Business certified by the OSDS which is automatically designated by the OSDS as a Micro Business due to gross annual receipts falling below the OSDS-designated dollar amount.

If the above designations apply, please provide the OSDS provided Certification ID.

If this designation is not applicable, please leave blank.

No response submitted

IS THE PROPOSER A LOCAL "SMALL" OR "MICRO" NON-PROFIT?

As Defined by Chapter 2.89.020 of the San Mateo County Ordinance Code:

“Small Non-Profit” means a Local Non-Profit with an annual revenue of \$1,000,000 to \$2,500,000 according to its most recently filed IRS Form 990.

“Micro Non-Profit” means a Local Non-Profit with an annual revenue of less than \$1,000,000, according to its most recently filed IRS Form 990.

If the above designations apply, please provide your latest filed IRS form 990. A filing from the last two calendar years is acceptable.

If this designation is not applicable, please leave blank.

No response submitted

### 3. Technical Proposal

INTRODUCTION AND EXECUTIVE SUMMARY \*

Submit a letter of introduction and executive summary of the proposal. The letter must contain:

- Name, title and contact information (email, phone, and address) for representative of proposer that is responsible for communication related to this RFP.
- Name, title, contact information, and signature of person authorized to obligate firm to perform the commitment contained in the proposal.

Submission of the letter will constitute a representation by proposer that it is willing and able to perform the commitments contained in the proposal and has not violated the terms of this RFP.

Intro\_Letter\_and\_Exec\_Summary\_-Final\_TWG\_2025-RFP-005.pdf

STATEMENT OF MINIMUM QUALIFICATIONS \*

Describe how the proposer meets the minimum qualifications as set forth in **Minimum Qualifications** of this RFP.

Submission of the Minimum Qualifications checklist is not a substitute for providing a detailed written response.

### Proposer Qualifications

The range of our team’s collective technical expertise covers all the subject areas required by the RFP. Our team holds expertise in designing and evaluating programs at the complex intersections of juvenile and criminal justice systems, social services, health, behavioral health, education, and child welfare. We understand these systems because our staff members have devoted their varied careers to direct services, program management, evaluation, and research.

TriWest Group (TriWest) has been providing evaluation and consulting services in these systems for 26 years, in California and across the country. Our national perspective allows us to consistently tailor new innovations and best practices to a community’s needs. For this project, TriWest will partner with Behavioral Health Data Project (BHDP), founded in Sacramento County in 2022. Its founder, Samantha Spangler, has been providing behavioral health, social services, and juvenile and criminal justice systems data, research, and evaluation services in California for the past 15 years.

TriWest has been providing similar services for Santa Clara County’s Juvenile Justice Coordinating Committee (JJCC) since January 2020, although the original contract was to support working groups of the Juvenile Justice Services Committee (JJSC), which was dissolved in 2023. For the past 5 years, we have been providing technical consultation, evaluation, and data analysis services to help the JJSC and JJCC understand and mitigate the disproportionate representation of minority youth in the juvenile justice system. BHDP joined the Santa Clara team in 2023 and has been providing local, in person support. More details regarding our experience and qualifications are included in Section 3.8.

### Program Manager Qualifications

For this consultation, we are proposing two program managers. Tonya Aultman-Bettridge, PhD, will serve as the overall project lead/manager. Samantha Spangler, PhD, will be our local program manager. A brief description of each is listed below, with further details provided in Section 3.9.

**Tonya Aultman-Bettridge, PhD**, is a Partner and Chief Information Officer with TriWest based in Eugene, Oregon. Tonya has been managing projects on systems change research and evaluation in health and human services, particularly child welfare and juvenile justice systems, as well as primary and behavioral health integration for the past 30 years. She has led the Santa Clara JJCC project for the past 5.5 years.

**Samantha Spangler, PhD**, is the owner of BHDP. Since founding BHDP in 2022, Samantha has evaluated behavioral health programs in five different California counties, including the Behavioral Health Racial Equity Collaborative in Sacramento County. BHDP has also facilitated community engagement processes in Placer and Modoc counties. Prior to founding BHDP, Samantha directed the Research and Evaluation Department at the California Institute for Behavioral Health Solutions (CIBHS) from 2018 to 2022, where she led evaluations of two Whole Person Care pilots and the Multidisciplinary Assessment Team (MAT) process for identifying the strengths and needs of newly detained children and their families in Los Angeles (LA) County.

#### PROJECT APPROACH\*

This section should correlate to the Scope of Work . Proposer should give a short summary describing how it will perform the relevant work

##### 3.3.a. Program Evaluation & Reporting

Upon award, we (TriWest and BHDP) will collaborate with Probation to clarify overarching evaluation goals and key evaluation questions that will inform the development of a county-wide evaluation plan. The resulting goals will be specific, measurable, achievable, relevant, and time-bound (SMART). We will also evaluate existing indicators (dosage, demographics, relevant outcomes, program strength and challenges, and client success stories), map them directly to probation’s evaluation goals, and talk to key community stakeholders to establish their “adequacy in assessing and improving the effectiveness of its programs, enhancing accountability, and advancing positive outcomes for justice-involved individuals and their communities.”

We will begin by reviewing prior annual program evaluation reports and Probation’s existing Local Action Plan (LAP) and Juvenile Justice Realignment Block Grant (JJRBG) plans to help determine evaluation priorities and questions. After developing the evaluation questions and link those to evaluation metrics, we will identify data collection sources, methods (e.g., key informant interviews, surveys, attendance reports), and frequency to measure progress toward Probation’s goals. We will also explore the degree to which we can incorporate secondary analysis and county, state, and national datasets (e.g., National Survey on Drug Use and Health, California Behavioral Risk Factors Surveillance System) to understand the county-wide effects of juvenile justice programs. This will then be developed into an Evaluation Plan that will outline specific analytic procedures to review and monitor process and outcome measures as well as other specific data points required to measure progress and outcomes for each funding stream: Juvenile Justice Crime Prevention Act (JJCPA), Youthful Offender Block Grant (YOBG) Program, and the JJRBG.

We will also thoroughly review Probation's current data collection tools and identify opportunities to improve previous data collection methods and tools, including creating surveys, to collect necessary program measures. Our team will analyze each data source's functionalities, data structures, and reporting capabilities. We will develop a strategy to integrate these tools into the Evaluation Plan and suggest the need for new tools and/or structures. This may involve standardizing data formats and establishing automated data sharing processes where possible. We will work closely with Probation to identify information gaps and discuss recommendations for the design, testing, and implementation of additional data collection tools, as needed.

TriWest and BHDP staff have extensive experience in evaluation design and implementation, provide our clients with technical assistance on selecting evidence-based tools, and working with programs and clients to ensure the quality and integrity of data collection methods. This can include trainings, office hours, and rapid cycle feedback reporting to improve data collection in real time. We will draft an evaluation plan that outlines the:

- Key questions to be answered by the evaluation
- Methods and timeline for identifying, collecting, and reporting data and data sources
- Tools to collect and analyze data
- Decision-making processes for quality improvement
- Thresholds for determining when changes are needed
- Communications plans to staff, partners, and the community

**We strongly believe that an evaluation is good only when the findings are directly and immediately useful in improving the lives of the people served.** TriWest and BHDP will produce two annual evaluation reports that answer key evaluation questions related to YOBG and JIRBG programs (Report 1) and to JJCPA and JPAF programs (Report 2). The reports will include an analysis of data collected and recommendations for improvements. In addition to written reports that comply with funder reporting requirements, we will also produce a series of more digestible fact sheets, data dashboards and infographics to communicate findings to staff, community-based organization (CBO) partners and the community in ways that spark dialogue and lead to meaningful change.

### 3.3.b. Local Action Plan for Juvenile Services Development

TriWest is committed to employing a culturally responsive, strength-based, collaborative process to LAP development that builds partnerships with community and tribal partners and other key stakeholders. We have a fourfold approach to local strategic planning and action plan development: (1) direct, on-the-ground facilitation as we have experience helping communities across the country conduct systems/community needs assessments and develop logic models, strategic plans, and sustainability plans; (2) comprehensive knowledge of national best practices; (3) use of planning tools that model the current system and compare it to the desired system; and (4) a focus on equity. We recognize that barriers, access, utilization and outcomes are inequitable because of race, ethnicity and/or tribal affiliation; geography (rural vs urban); income; religious, linguistic, and cultural factors; as well as gender identity and sexual orientation.

We will ground the development of the County's 2030–2035 LAP in **asking stakeholders what they want rather than making decisions for them about the community's needs** and in understanding what approaches work now rather than what has worked in the past. Our consultations entail rigorous assessments of quantitative and qualitative data, helping our clients develop strategies that result in the desired community outcomes.

We will work with the JJCC to convene and facilitate community listening sessions to gather feedback from JJCC members, Probation leadership, and community-based organizations. We also will facilitate listening sessions and talking circles for community members, including youth and families with lived experience with the juvenile justice system. In addition to listening sessions/talking circles, we will conduct interviews with key stakeholders.

We also propose having an ad hoc committee of the JJCC participate in an asset mapping process to identify key community resources and gaps in services. We will use the resulting asset map to inform the creation of a Sequential Intercept Map (SIM). We will work with Probation and the JJCC to use SIM mapping to identify points in the system where there are opportunities to divert youth from further system penetration and where supports are needed to support youth transitioning across levels of the system. We describe these two tools in detail in the next section.

The LAP will include the following elements:

- **Assessment of resources** based on the results from the asset mapping and SIM mapping exercises.

- **Identification of high-risk areas** based on a geographical analysis of where youth involved in the juvenile justice system live and where arrests are occurring. We will overlay this map with the county's social vulnerability index and locations of service providers to determine whether the right resources are in the right places to support youth most at risk.
- **A collaborative and integrated juvenile justice action strategy:** We will engage the courts, probation, child welfare, behavioral health, education, and tribal communities to develop a youth-centered, trauma-informed coordinated/collaborative action plan to improve outcomes for youth involved in the justice system.
- **Information-sharing strategies and performance measures:** We will help the JJCC craft focused communication strategies that stress reduction of staff burden and are designed to efficiently achieve a specific purpose (e.g., service coordination, incident documentation, quality improvement, evaluation). Performance measures will align with the overarching goals of the LAP.
- **Data systems assessment, including data tracking, accountability, and oversight:** The LAP will include a comprehensive data collection plan that includes a list of all data elements needed for system operations, their respective locations (e.g., courts, probation, CBOs), person/position responsible, and details and frequency of collection and processing. We will document data flows and provide consultation around necessary data use/data sharing agreements to ensure that data collection processes support LAP implementation and minimize staff burden.
- **Identification of major challenges to implementation and recommendations for addressing them:** During our discussions with each stakeholder group, we will identify past and current system challenges and work with partners to develop solutions.
- **Optional elements such as target population and rehabilitation goals:** We will work with the JJCC to determine other plan elements needed based on community and system needs. However, our approach to planning is not to try to *do everything or be everything* that youth and families need. We believe in identifying the most pressing needs, finding early successes that can build a strong system foundation, and developing a set of focused and achievable objectives.

### 3.3.c. Evaluation of Existing Resources

We will work with Probation, partners, and the community to develop a plan to document and evaluate existing county resources for both probation services (juvenile and adult) as well as other community services that serve people on probation and those at risk for justice system involvement. This will likely include education, social services and child welfare, behavioral health systems (mental

health and substance use prevention intervention and treatment), public health/physical health, and domestic violence prevention and intervention.

We have developed and customized tools for helping communities understand the availability and adequacy of current resources as well as system gaps. We describe these briefly below. More details and graphic examples of some of these models can be found in Section 3.8 (proposer qualifications).

**Asset Mapping** - Asset mapping is a strength-based approach to gathering information about community resources, opportunities, and gaps. When combined with population-level data analysis and community stakeholder engagement, the asset mapping process can help a community build on existing resources and capitalize on opportunities to address system gaps. In 2024 we worked with the North Dakota Behavioral Health Department System of Care to complete an asset map of Bismarck and the surrounding area.

**Sequential Intercept Model (SIM) Mapping** - SIM, otherwise known as the Zero Intercept Model, is a conceptual scheme that helps communities examine the intersections between criminal justice and mental health systems as they address the criminalization of people with mental illness. Although the model was built to address the criminalization of mental illness, it is relevant to understanding the interconnectedness across the human and social services agencies that influence outcomes for individuals already involved in or at risk for involvement in either the juvenile or criminal justice system. Recently, the model has been adapted to reflect intercepts within the juvenile justice system. We have used this tool to help identify areas of disproportionality within the Santa Clara juvenile justice system. A graphic showing a sample SIM map that outlines the resources in place for an ideal framework of youth services is included in Section 3.8.

**Ideal Children's Behavioral Health Continuum of Care** - The ideal children's behavioral health continuum of care lays out a seamless, comprehensive array of services and supports that link promotion and prevention services with physical health, mental health, and substance use disorder treatment. This continuum of care takes a population-based perspective to support all children, including those with emerging, low to moderate, and complex behavioral health needs. The continuum includes six components that range from promotion and prevention services to the most intensive interventions. It provides an overview of recommended practices for each component. Critical to the ideal continuum of care is comprehensive crisis care. Children, youth, young adults, and their families

need a crisis service array that is designed to meet their needs and support them in their homes and communities. Mobile Response and Stabilization Services (MRSS), a best practice model, is a home and community-based response framework that combines mobile response teams with home and community-based stabilization services. MRSS can be embedded in a full continuum of services or system of care (SOC).

The final result of these efforts will be an update of Probation's Resources Guide for Youth and Their Families each July.

### 3.3.d. Juvenile Justice Crime Prevention Act (JJCPA) and Youthful Offender Block Grant (YOBG) Program

The TriWest and BHDP team will support Probation in fulfilling the JJCPA and YOBG Annual Plan requirements set forth by the Office of Youth and Community Restoration and, ultimately, in achieving its goals of reducing crime committed by youth and increasing support and care for youth in San Mateo County. Drawing on our considerable experience conducting needs assessments and asset mapping for communities, counties, and states, we will help Probation assess the current state of services and identify and prioritize neighborhoods, schools, and other areas that are experiencing challenges that often translate to higher public safety risks.

TriWest will begin by reviewing San Mateo's current process for updating the Annual Plan. We will work closely with the Probation point of contact to learn about the process, what is working well, and where there are opportunities for improvement. We will also gather feedback from community providers to hear their perspective on what is working well and where adjustments are needed. We will collect this information through targeted conversations or a brief survey. Our goal is to make the completion of the Annual Plan as smooth and seamless as possible, while collecting information that will support Probation and providers. We will use this information to tailor our approach to the local environment and ensure that our process is building on the work already happening throughout San Mateo County.

We have protocols and processes for organizing and synthesizing system-level data, which will allow us to efficiently contribute to the development of the Annual Plan.

After discussions with Probation, we will document our approach to updating the Annual Plan, which may include targeted key informant interviews and quantitative data analysis. Possible data sources will be determined through conversations with Probation and may include probation and law enforcement data; school district data on suspensions, drug use, and truancy; California Youth Risk Behavior Survey; Kids Count Data Center, UCR FBI data, and other available crime statistics at the local level; and the CDC Social

Vulnerability Index. We also have the capacity to use geographic information system (GIS) to map crime and other crime risk factors at the ZIP code or census tract level.

### 3.3.e. Juvenile Justice Realignment Block Grant (JJRBG) Plan

We will assist in the JJRBG subcommittee as it develops the County's annual JJRBG Plan, drawing on findings during the JJCPA and YOBG Annual Planning process (described in the section above). The final plan will contain the required nine sections: (1) Subcommittee Composition, (2) Target Population, (3) Programs and Services, (4) Juvenile Justice Realignment Block Grant Funds, (5) Facility Plan, (6) Retaining the Target Population in the Juvenile Justice System (7) Regional Efforts, (8) Data, (9) Other Updates.

We will collaborate with Probation and the JJRBG subcommittee to facilitate a public process that results in a comprehensive and actionable plan that reflects the program's original intent of reforming the juvenile justice system, moving from state-run facilities so that serious youth offenders can receive services in their communities, closer to their families and support systems that can help to prevent them from moving to the criminal justice system.

Data for this planning may include a trend analysis, comparing the number of serious youth offenses in the county, prior to the start of the JJRBG in 2021 to now, average daily census for secure track programs, an examination of the specific risks and needs for this specific group of youth as well as any changes to recidivism rates since the change to a county-controlled system.

### 3.3.f. Adult and Pretrial Services Research & Analysis

We will draw on our experience working within the adult criminal justice system, as well as our experience researching pretrial and diversion services, to help Probation submit the annual Community Corrections Partnership (CCP) Local Implementation Plans and conduct research related to adult and pretrial Services in San Mateo County.

First, similar to our approach for the JJCPA and YOBG annual plans, we will begin by reviewing San Mateo's current process for updating the CCP Local Implementation Plan (i.e., what is working well and opportunities for improvement). We will use this information to tailor our approach to San Mateo.

Second, within the first few months of the project, we will work with Probation's point of contact to identify research priorities related to adult and pretrial Services. Based upon the identified priorities, we will draft a research plan that will include developing research

questions, reviewing the literature, and examining identified comparison counties or states. We will determine the appropriate research methods to answer the research questions and plan for collecting and analyzing qualitative data (e.g., key informant interviews and focus groups) and quantitative data (e.g., publicly available datasets and requested local data).

TriWest's lead, Tonya Aultman-Bettridge, also serves as TriWest Group's Privacy and Information Security Official and chairs its federally registered Institutional Review Board. She leads efforts to create internal policy and provides oversight on all TriWest projects regarding the protection of personal health information and personally identifiable information. She will oversee all research activities with regard to data security and participant confidentiality, guided by TriWest's *Protection of Confidential Information* policy (available on request).

In addition to the team members assembled for this project, TriWest will involve our data team as needed. Our data team includes staff members with statistical proficiency (including Excel, SPSS, SAS, STATA, R, and SQL), epidemiological training, survey construction and analysis expertise, GIS capabilities, and data visualization expertise (Tableau, Canva, and Datawrapper).

We will write up our findings in a format chosen based on the identified purpose and audience of the research projects (e.g., in-depth reports, brief fact sheets, data visualizations such as dashboards or infographics). We are practiced at writing and designing research products that can effectively guide new efforts and programs, advocate for policy changes, and share information with the community.

### 3.3.f. Meetings & Collaboration

Our local program manager will attend all in person meetings. Both the overall and local program manager will attend all virtual meetings and in-person meetings as warranted based on presentations being delivered. Other staff may also join meetings when their presence will enhance meeting presentations or discussions.

Our consultations emphasize collaboration with all system participants and interested parties to help children, families, adults, and communities achieve their goals. We are adept at helping programs develop strategies that can maximize outcomes using evidence-based practices and a strengths-based approach to engaging diverse groups of individuals and families.

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#### SCOPE OF WORK TASKS/MILESTONES\*

Describe your proposed approach to tasks/milestones

Based on our extensive experience with county- and community-level evaluations, we propose a scope of work that will efficiently and effectively provide Probation with the evaluation and research support needed to serve the people of San Mateo County. Our work depends on effective project management, adaptability, and open communication. Our skilled consultants and evaluators excel at managing complex assessments and ensuring high-quality, timely deliverables. With a strong focus on project oversight, we use [proven methodologies](#) to stay on track, within scope, and aligned with client objectives. Each project is carried out by experienced project leads and managers who bring extensive expertise in coordinating diverse teams, overseeing all phases of the project life cycle, and engaging a wide range of stakeholders to ensure success.

It all starts with the commitment we make to every client that our most expert, senior consultants will not only guide the project but also staff each component of the work. Our project lead, task leads, and subject matter experts will be working with you from start to finish.

Tonya Aultman-Bettridge will lead the team and act as the single point of contact for the duration of the project. She will be responsible for day-to-day management and timely completion of deliverables, meeting contractual requirements throughout the project, developing agendas and facilitating meetings, and addressing questions and concerns. The project coordinator, Brittany Buttry-Watson, will help Tonya keep all project activities on track.

We are dedicated to delivering high-quality results in all aspects of our work. To ensure the accuracy and usefulness of our approach, findings, and recommendations, we implement rigorous internal quality control processes. Every phase of our work—project plans, analyses, deliverables—undergoes thorough peer review to confirm that our products meet the project’s objectives and are of the highest standard. TriWest has established a robust project management framework, led by experienced personnel, to guarantee the timely delivery of quality products within budget.

Our project management approach and the tools we employ are flexible and selected to meet each client’s specific needs. But the primary asset we offer, according to many of our current and past clients, is a **flexible yet unwavering client-centered focus that ensures we pursue client goals while being mindful of the demands they face in their current contexts.**

Project management tasks will occur throughout the project, ensuring that we complete the six tasks documented in the RFP. These tasks and milestones are listed below and further explicated in Section 3.5.

#### Task 1. Program Evaluation & Reporting

Milestones:

- A. Develop plan for evaluating juvenile programs operated by CBOs
- B. Conduct evaluation of CBOs
- C. Provide technical assistance to CBOs
- D. Develop two annual reports focusing on CBOs

#### Task 2. Local Action Plan Development

Milestones:

- E. Collect stakeholder input
- F. Draft the 2030–2035 LAP

#### Task 3. Evaluation of Existing Resources

Milestones:

- G. Assess existing services across Probation
- H. Evaluate resources available to the community
- I. Update Probation’s [Resource Guide for Youth and Their Families](#)

#### Task 4. Juvenile Justice Crime Prevention Act (JJCPA) and Youthful Offender Block Grant (YOBG) Program

Milestones:

- J. Assess current process for updating Annual Plan
- K. Update Annual Plan

Task 5. Juvenile Justice Realignment Block Grant (JJRBG) Plan

Milestones:

- L. Assess current process for updating Annual Plan
- M. Collect community input
- N. Update Annual Plan

Task 6. Adult and Pretrial Services Research & Analysis

Milestones:

- O. Assess current process for updating CCP Local Implementation Plan
- P. Update CCP Local Implementation Plan
- Q. Design and complete research projects related to Adult and Pretrial Service

PROPOSED SCHEDULE \*

Attach proposed schedule reference ability to complete the project within the County's required time frame

Project\_Timeline\_-Final\_TWG\_2025-RFP-005.pdf

INNOVATIONS\*

Reference any notable innovations or improvements that you expect to provide (with respect to, for example, efficiency, technology, sustainability)

We believe that there are three specific areas where the TriWest/BHRD team will bring notable innovations to the project.

**Expertise** - as noted throughout the proposal, we have extensive experience and have already developed tools to do this work that are ready to use. This will add efficiency to the project and will ensure we can hit the ground running, with less of a learning curve than some other organizations may have. In particular, we have invested in the development of extensive tools used to conduct community surveys, review data submissions from multiple community programs, asset mapping, SIM mapping, data collection (qualitative and quantitative) for assessing systems of care and justice systems planning.

**Data visualization** - our data team has specific expertise in the development of GIS maps, data dashboards and other info graphics that can help to communicate findings in ways that are digestible by a variety of audiences and that can facilitate deep discussions of community resources, needs and gaps that are vital to any planning effort.

We have significant experience in engaging people with lived experience in evaluations. For example, we currently work with Santa Clara County's Youth Advisory Council to support them as they design and conduct a research project to better understand community perspectives around policing in areas where significant juvenile arrests occur. We continually look for ways to incorporate the perspectives of people with lived experience into our evaluation planning and design, data collection and reporting/dissemination efforts.

#### PERFORMANCE MEASURES\*

Describe a plan for achieving performance measures

We will work with Probation to design a plan for measure contract performance over the life of the project. We anticipate those will include measures related to the timeliness of deliverables, the quality of deliverables and presentations, participation in meetings, burden on probation staff to participate in project activities, and community responsiveness.

We will submit a periodic progress with all invoices that describe all activities for the period, progress on achieving tasks outlined in the final project timeline, challenges encountered as well as plans to ensure that those challenges do not put any project deliverables at risk.

During monthly meetings with probation staff, we will review the timeline, discuss project successes and challenges and make incremental adjustments, as needed, based on changing needs, community conditions or county circumstances.

#### FIRM QUALIFICATIONS \*

Attach information regarding background and qualifications, including the following:

- A brief description of the proposer.
- A description of not more than three (3) projects similar in size and scope conducted by the proposer, including the client, reference and telephone numbers, primary staff members involved, budget, schedule, and project summary. Descriptions should be limited to one (1) page for each project.
- If subcontractors are anticipated, identify them (if known) and provide information on how they will be used.

3.8\_Firm\_Qualifications\_-Final\_TWIG\_RFP\_2025-RFP-005.pdf

#### TEAM QUALIFICATIONS\*

Provide a chart identifying:

- Project team and reporting structure
- Lead project manager
- Role each person will play in the project

Provide a brief description of the experience and qualifications of the project team members, including short resumes if desired.

Written assurance that the key individuals listed and identified will be performing the work and will not be substituted or reassigned without the County's prior approval

3.9\_Team\_Qualifications\_-Final\_TWIG\_RFP\_2025-RFP-005.pdf

#### REFERENCES\*

Provide 2 references for each of the following, including the name, position/title, address, email, and telephone number of recent clients (preferably other public agencies):

3.10\_References\_-Final\_TWG\_RFP\_2025-RFP-005.pdf

FEE PROPOSAL\*

The Fee Proposal should be submitted as a separate PDF file from the Technical Proposals detailed in Required Documents.

The County reserves the right to accept other than the lowest priced offer and to reject any proposals that are not responsive to this request.

3.11\_Fee\_Proposal\_-Final\_TWG\_RFP\_2025-RFP-005.pdf

San Mateo County Probation Department  
RFP No. 2025-RFP-00559 Research and Evaluation Services

August 12, 2025

Dear Proposal Reviewers:

TriWest Group, LLC (TriWest) is pleased to submit this proposal to provide research and evaluation services to the San Mateo County Probation Department. TriWest is a health and human services consulting company that specializes in helping clients with evaluation, performance monitoring, and needs assessments. Our mission is to help health and human services organizations do a better job of helping others.

We propose to partner with Behavioral Health Data Project (BHDP), a small woman-owned business in Sacramento County, for this project. TriWest and BHDP have successfully worked together on a similar project in Santa Clara County since 2023.

For all communication regarding this proposal, please contact:

Tonya Aultman-Bettridge, PhD  
Partner and Chief Information Officer, TriWest Group  
303.717.2395 | [taultman-bettridge@trivestgroup.net](mailto:taultman-bettridge@trivestgroup.net)  
4450 Arapahoe Avenue, Suite 100, Boulder, CO 80303

Thank you for the opportunity to introduce ourselves to you and to bid on this important work.

Sincerely,



Type text here

Pete Selby, PhD  
Managing Partner, TriWest Group

## **Executive Summary**

### **Proposer Qualifications**

TriWest Group (TriWest) has been providing evaluation and consulting services in human services systems for 26 years, in California and across the country. TriWest has been providing similar services for Santa Clara County's Juvenile Justice Coordinating Committee (JJCC) since January 2020. TriWest's national perspective allows staff to consistently tailor new innovations and best practices to a community's needs. For this project, TriWest will partner with Behavioral Health Data Project (BHDP), founded in Sacramento County in 2022. Its founder, Samantha Spangler, has been providing data, research, and evaluation services in the fields of behavioral health, social services, and juvenile and criminal justice systems in California for the past 15 years.

### **Program Manager Qualifications**

For this consultation, we (TriWest and BHPD) are proposing two program managers. Tonya Aultman-Bettridge, PhD, will serve as the overall project lead/manager. Samantha Spangler, PhD, will be our local program manager.

Tonya Aultman-Bettridge, PhD, is a Partner and Chief Information Officer with TriWest based in Eugene, Oregon. She has led the Santa Clara JJCC research and evaluation project for the past 5.5 years.

Samantha Spangler, PhD, is the owner of BHDP. Since founding BHDP in 2022, Samantha has evaluated behavioral health programs in five different California counties, including the Behavioral Health Racial Equity Collaborative in Sacramento County. Prior to founding BHDP, Samantha led evaluations of two Whole Person Care pilots and the Multidisciplinary Assessment Team (MAT) process for identifying the strengths and needs of newly detained children and their families in Los Angeles County.

## **Project Approach**

### ***3.3.a. Program Evaluation & Reporting***

Upon award, we will collaborate with Probation to clarify overarching evaluation goals and key evaluation questions that will inform the development of a county-wide evaluation plan. The resulting goals will be specific, measurable, achievable, relevant, and time-bound (SMART). We will also evaluate existing indicators (dosage, demographics, relevant outcomes, program strength and challenges, and client success stories), map them directly to Probation's evaluation goals, and talk to key community stakeholders to establish their "adequacy in assessing and improving the effectiveness of its [Probation's] programs, enhancing accountability, and advancing positive outcomes for justice-involved individuals and their communities."

We will draft an evaluation plan that outlines the:

- Key questions to be answered by the evaluation
- Methods and timeline for identifying, collecting, and reporting data and data sources
- Tools to collect and analyze data
- Decision-making processes for quality improvement
- Thresholds for determining when changes are needed
- Communications plans to staff, partners, and the community

We strongly believe that an evaluation is only good when the findings are directly and immediately useful in improving the lives of the people served. TriWest and BHDP will produce two annual evaluation reports that answer key evaluation questions related to YOBG and JJRBG programs (Report 1) and to JJCPA and JPAF programs (Report 2).

### ***3.3.b. Local Action Plan (LAP) Development***

TriWest is committed to employing a culturally responsive, strength-based, collaborative process to LAP development that builds partnerships with community and tribal partners and other key stakeholders. We have a fourfold approach to local strategic planning and action plan development: (1) direct community engagement to understand needs and service gaps; (2) comprehensive knowledge of national best practices; (3) use of planning tools that model the current system and compare it to the desired system; and (4) a focus on equity.

We will ground the development of the County’s 2030–2035 LAP in asking stakeholders what they want rather than making decisions for them about the community’s needs and in understanding what approaches work now rather than what has worked in the past.

### ***3.3.c. Evaluation of Existing Resources***

We will work with Probation, partners, and the community to develop a plan to document and evaluate existing county resources for both probation services (juvenile and adult) as well as other community services that serve people on probation and those at risk for justice system involvement. This will likely include education, social services and child welfare, behavioral health systems (mental health and substance use prevention, intervention, and treatment), public health/physical health, and domestic violence prevention and intervention.

We have developed customizable tools for helping communities understand the availability and adequacy of current resources as well as system gaps. We describe these tools (asset mapping, Sequential Intercept Model [SIM] mapping, ideal children’s behavioral health system of care) in the full proposal.

### ***3.3.d. Juvenile Justice Crime Prevention Act (JJCPA) and Youthful Offender Block Grant (YOBG) Program***

The TriWest and BHDP team will support Probation in fulfilling the JJCPA and YOBG Annual Plan requirements set forth by the Office of Youth and Community Restoration and, ultimately,

in achieving its goals of reducing crime committed by youth and increasing support and care for youth in San Mateo County. Drawing on our considerable experience conducting needs assessments and asset mapping for communities, counties, and states, we will help Probation assess the current state of services and identify and prioritize neighborhoods, schools, and other areas that are experiencing challenges that often translate to higher public safety risks.

### ***3.3.e. Juvenile Justice Realignment Block Grant (JJRBG) Plan***

We will help the JJRBG subcommittee as it develops the County's annual JJRBG Plan, drawing on findings from the JJCPA and YOBG annual planning process (described in the section above). We will also work with the subcommittee to facilitate a public process that results in a comprehensive and actionable plan that reflects the program's original intent of reforming the juvenile justice system by transitioning from state-run facilities to community-based services for youth who have committed serious offenses. This allows youth to be closer to their families and support systems, which can help to prevent them from involvement with the criminal justice system.

### ***3.3.f. Adult and Pretrial Services Research & Analysis***

We will review San Mateo's current process for updating the CCP Local Implementation Plan (i.e., what is working well and opportunities for improvement). We will use this information to tailor our approach to San Mateo.

Within the first two months of the project, we will work with Probation's point of contact to identify research priorities related to adult and pretrial services. Based upon the identified priorities, we will draft a research plan that will include developing research questions, reviewing the literature, and examining identified comparison counties or states. We will determine the appropriate research methods to answer the research questions and plan for collecting and analyzing qualitative data (e.g., key informant interviews and focus groups) and quantitative data (e.g., publicly available datasets and requested local data).

TriWest's lead, Tonya Aultman-Bettridge, also serves as TriWest Group's Privacy and Information Security Official and chairs its federally registered Institutional Review Board. She leads efforts to create internal policy and provides oversight on all TriWest projects regarding the protection of personal health information and personally identifiable information. She will oversee all research activities with regard to data security and participant confidentiality, guided by TriWest's Protection of Confidential Information policy (available on request).

We will write up our findings in a format chosen based on the identified purpose and audience of the research projects (e.g., in-depth reports, brief fact sheets, data visualizations such as dashboards or infographics). We are practiced at writing and designing research products that effectively guide new efforts and programs, advocate for policy changes, and share information with the community.

## **Project Management and Timeline**

Based on our extensive experience with county- and community-level evaluations, we propose a scope of work that will efficiently and effectively provide Probation with the evaluation and research support needed to serve the people of San Mateo County. Our work depends on effective project management, adaptability, and open communication. Our skilled consultants and evaluators excel at managing complex assessments and ensuring high-quality, timely deliverables. Each project is carried out by experienced project leads and managers who bring extensive expertise in coordinating diverse teams, overseeing all phases of the project life cycle, and engaging a wide range of stakeholders to ensure success.

A detailed timeline is included in Section 3.5 of this proposal.

## **Firm Qualifications**

Founded in 1999, TriWest Group (TriWest) is a health and human services consulting company with a wealth of experience in helping federal, state, tribal, and local governments; foundations and institutes; health and human services agencies; social services and juvenile justice agencies; criminal justice agencies; employer groups; and educators and schools. The members of our consulting team come from diverse backgrounds and include experts in health and human services, data analysis, strategic planning, evaluation, and research. TriWest has worked on projects in 38 states and the District of Columbia. TriWest brings broad expertise and decades of experience conducting multi-pronged analyses, collaborating with clients, and developing practical strategies and solutions for improving community outcomes.

Our partner agency, Behavioral Health Data Project is a California-based consulting firm focused on empowering behavioral health organizations to use data to improve the way they serve their clients and their communities. Since 2022, BHPD has helped organizations develop practical, data-driven ways to provide equitable, person-centered, and recovery-oriented services that meet the needs of their communities.

## **Descriptions of Three (3) Projects Similar in Size and Scope**

### ***Project 1: Santa Clara Juvenile Justice Coordinating Committee (JJCC)***

Since 2020, TriWest has provided research, evaluation, and technical assistance services to Santa Clara's JJCC to address racial and ethnic minority disproportionality in the juvenile justice system. As part of this work, TriWest facilitated convenings of the Race Equity in Prevention and Race Equity in Justice Systems workgroups and conducted ad hoc research, evaluation, and technical assistance projects. This has included analyzing secondary data and proposing new analytic techniques (e.g., using disproportionality index calculations, geo-mapping) to better understand youth who are involved in the juvenile justice system. TriWest has also engaged in research and evaluation of restorative justice practices and mentoring programs and helped to construct a SIM map to identify existing community resources for intervening with youth in need of services and opportunities to mitigate disproportionality at key decision points (intercepts).

***Project 2 (subcontractor, BHDP): Los Angeles County***

From 2019 to 2022, BHDP, working with the California Institute for Behavioral Health Services (CIBHS), completed an evaluation of the Los Angeles County Multidisciplinary Assessment Team (MAT). This evaluation included quantitative analysis of administrative data, qualitative analysis of completed assessment forms and court documents, stakeholder interviews, and surveys to assess the MAT process for identifying the strengths and needs of newly detained children and their families in Los Angeles County. This evaluation was a collaborative effort with the Los Angeles County Office of Child Protection, Department of Mental Health, and Department of Children and Family Services. The evaluation team worked with Los Angeles County to design performance measures to assess the timeliness and quality of the assessment process, along with linkage to treatment and integration into case planning, using existing data collected by the County and contracted providers. The evaluation design was reviewed and approved by the Los Angeles County Juvenile Court and youth and family advocates. As part of the evaluation design process, parents of all eligible youth and all eligible youth aged 12 and above were notified about the planned evaluation and provided the opportunity to ask questions or opt out of the evaluation. The evaluation also included demographic analyses to identify disparities in the assessment process based on race, ethnicity, and language.

***Project 3: Elkhart County, Indiana***

TriWest has been providing technical assistance and evaluation services for Elkhart County, Indiana since 2019. This has included conducting SIM mapping of the juvenile justice system and other youth service systems; participating in steering committee planning processes; and evaluating the access, engagement and outcomes for youth at risk for involvement or involved in the juvenile justice system. TriWest is also the independent evaluator for federal grants for youth crisis response services for both Elkhart and neighboring St. Joseph County and served as the independent evaluator of Oaklawn Psychiatric Center's three-county Certified Community Behavioral Health Center (CCBHC) grant from 2019 to 2023.

### San Mateo County Research and Evaluation Services

#### Project Timeline, Milestones, and Deliverable Dates

■ = Deliverable submitted ● = Meetings/sessions ↔ = Ongoing activity Y=Year M=Month

Program Evaluation & Reporting Activities (Repeats Annually)	Dec 25	Jan 26	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Annual Kick-off meeting with probation staff and partners (Years 1-5)	●											
Monthly planning meetings with probation staff		●	●	●	●	●	●	●	●	●	●	●
Finalize workplan, timeline and communication plans (Year 1)	■											
Annual review of evaluation priorities and questions	↔											
Quarterly meetings with COBs (estimated, TBD)		●			●			●			●	
Develop evaluation plan review with JJCC (Year 1) Update plan annually and present to JJCC (Years 2-5)			■									
Collect data from CBOs and other secondary sources				↔								
Present evaluation progress and key preliminary findings, annually						●						
Prepare annual reports: YOBG and JJRBG programs (Report 1) and JJCPA and JPAF programs (Report 2)								↔				
<b>Deliverable: YOBG/JJRBG Annual Report; JJCPA/JPAF Annual Report</b>											■	
<b>Deliverable: Present report findings to JJCC</b>												●
Local Action Plan Development Activities	Y1	Y2	Y3	Y4	Y5 M 1	Y5 M 2	Y5 M 3	Y5 M 4	Y5 M 5	Y5 M 6		
Attend all Quarterly JJCC Meetings	●	●	●	●	●			●				
Review 2025-2030 plan and facilitate listening sessions				↔								
Complete community Asset map and/or SIM map					↔							
Collect additional data (as needed)						↔						
<b>Draft initial 2030-2035 LAP &amp; Review with JJCC</b>								■	●			
<b>Deliverable: Final 2030-2035 LAP for Juvenile Services</b>										■		

Evaluation of Existing Resources Activities (Repeats Annually)	Dec 25	Jan 26	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Kickoff - Monthly planning meetings with probation staff	●	●	●	●	●	●	●	●	●	●	●	●
Develop a full community Asset Mapping/SIM mapping annual strategy (Year 1) Review strategy annually (Years 2-5)	◀	▶						■				
Conduct mapping data collection and analysis to support JJRBG/LAP Planning		◀	▶						●			
Conduct community listening sessions to discuss and refine mapping results				◀	▶							
<b>Deliverable: Annual Resource Map Draft</b>						■						
<b>Deliverable: Final update of Probation’s Resources Guide for Youth and Their Families</b>								■				
Use resource maps to inform all planning activities and annual reports						◀	▶	▶	▶	▶	▶	▶
Juvenile Justice Crime Prevention Act (JJCPA) and Youthful Offender Block Grant (YOBG) Program Activities (Repeats Annually)	Dec 25	Jan 26	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Kickoff - Monthly planning meetings with probation staff	●	●	●	●	●	●	●	●	●	●	●	●
Review existing JJCPA and YPBG plans and annual reports	◀	▶										
Determine data collection needs (including KIIs and secondary data sources)		◀	▶									
Collect data to support JJCPA and YOBG program planning		◀	▶									
<b>Deliverable: Work with probation to update annual program plans</b>					■							
Review plans and plan progress bi-monthly with probation staff		●		●		●		●		●		●
Juvenile Justice Realignment Block Grant (JJRBG) Plan (Repeats Annually)	Dec 25	Jan 26	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Kickoff – Attend JJCC Realignment Subcommittee Meetings (estimated, TBD)		●				●				●		
Collect data (beyond above activities) needed for serious youth offenders and combine with asset/SIM mapping results		◀	▶									

Work with JJCC Realignment Subcommittee to draft JJRBG Annual Plan				■								
Conduct community listening sessions to discuss and refine the JJRBG annual plan					●	●						
<b>Deliverable: Final JJRBG Annual Plan</b>												

We will work closely with partners to develop a similar timeline for adult and pretrial services research and analysis once collaborative decisions have been made around goals and objectives. We will complete the Community Corrections Partnership (CCP) Implementation Plans in time to review in October and November annually to prepare for annual submission in early December.

### 3.8. Firm Qualifications

#### Brief Description of the Proposer

Founded in 1999, TriWest Group (TriWest) is a health and human services consulting company with a wealth of experience in helping federal, state, tribal, and local governments; foundations and institutes; health and human services agencies; social services and juvenile justice agencies; criminal justice agencies; employer groups; and educators and schools. The members of our consulting team come from diverse backgrounds and include experts in health and human services, data analysis, strategic planning, evaluation, and research. We have worked on projects in 38 states and the District of Columbia. We bring to our work broad expertise and decades of experience conducting multi-pronged analyses, collaborating with our clients, and developing practical strategies and solutions for improving community outcomes.

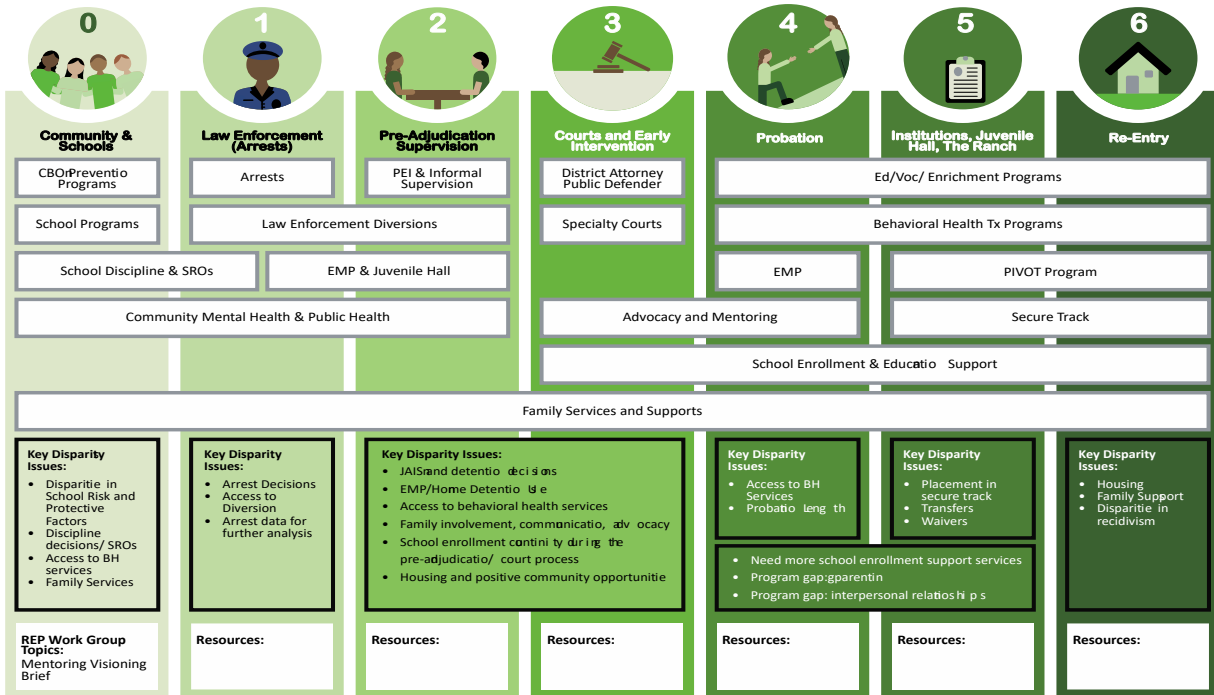
We have extensive experience conducting state and county systems research, needs assessments, and evaluations of best practices. We also have broad knowledge of successes, challenges, and lessons learned in states and localities across the country. We take on projects that help state and local stakeholders improve lives and support people in their efforts on behalf of themselves, their families, and their communities.

TriWest has a 23-year history of working with public agencies to assess the strengths of service delivery systems and to build on these strengths to achieve goals and positive outcomes for children, youth, and families. Our collaborative approach to data collection, analysis, and reporting engages organizational leaders; service providers; children, youth, and families; policymakers; and funders in designing and implementing services and supports to improve the mental health and well-being of young people. We have comprehensive systems and tools to conduct community needs assessments, gaps analysis, strategic planning, program/processes evaluation, and continuous program improvement efforts. Below are examples of three specific tools that we believe would be useful for this project.

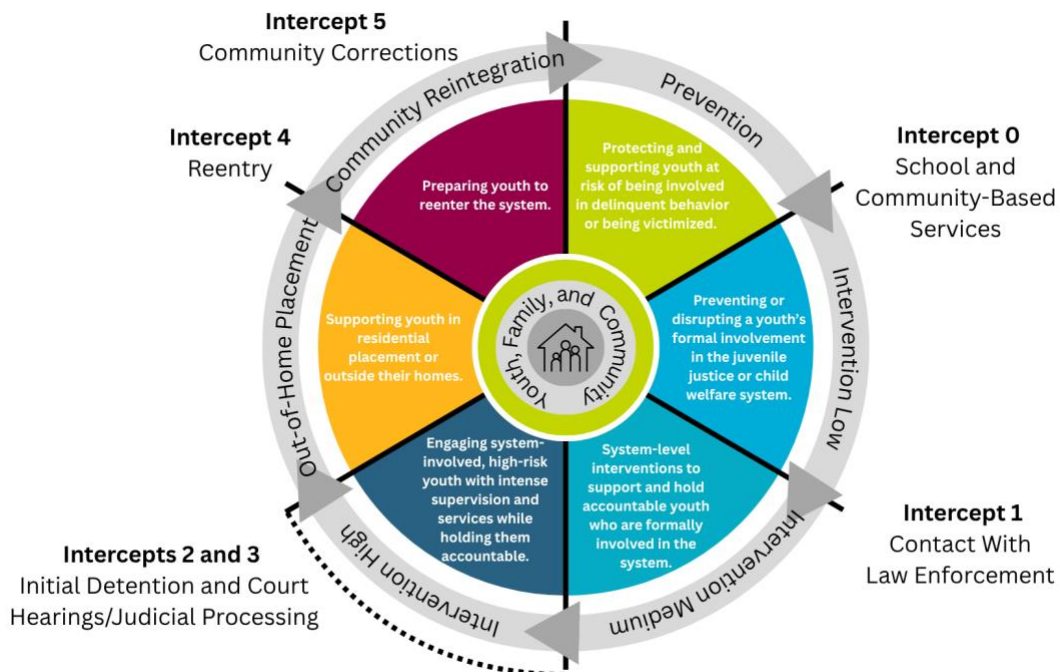
We will subcontract with Behavioral Health Data Partners (BHDP) for this project. BHDP brings 15 years of evaluation experience in program evaluation in California and specific California juvenile justice experience. TriWest has been successfully subcontracting with BHDP since 2023 for its Santa Clara project. Samantha Spangler, BHDP owner, will be our local program manager for the project. Her team will also provide data collection and analysis support.

The following **Sequential Intercept Model Mapping** graphics show how a community can map out juvenile justice resources and their intersections with other social domains.

## Juvenile Justice Sequential Intercept Model

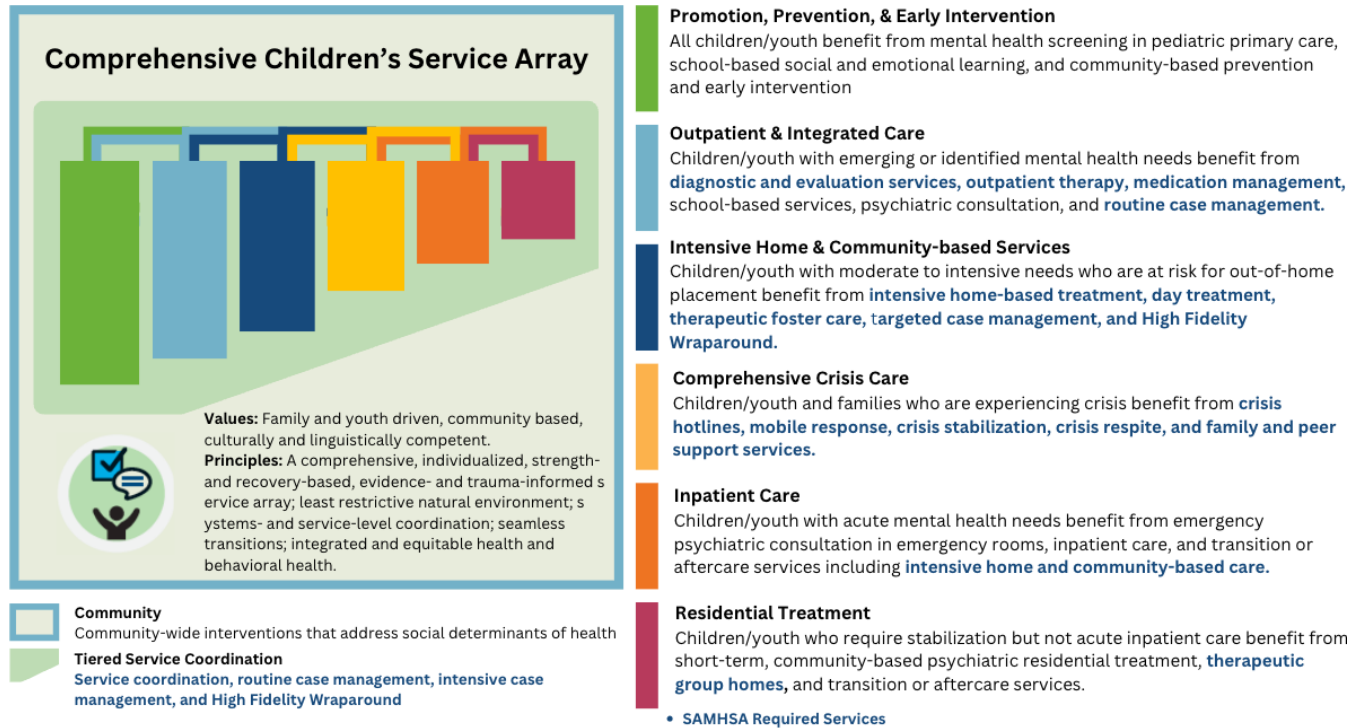


## Aligning the Office of Juvenile Justice and Delinquency Prevention's Continuum of Care With the Sequential Intercept Model



## MRSS/System of Care

The **ideal children's behavioral health continuum of care** is another powerful tool for comparing the current state of services to the ideal system that should be in place to support the well-being of children, youth, and families. We can also modify it to include all populations. It includes a continuum of service components that range in intensity from **crisis care** to **residential treatment services** and includes necessary social supports.



## Descriptions of Three (3) Projects Similar in Size and Scope

### Project 1: Santa Clara Juvenile Justice Coordinating Committee (JJCC)

Since 2020, TriWest has provided research, evaluation, and technical assistance services to Santa Clara's JJCC to address racial and ethnic minority disproportionality in the juvenile justice system. As part of this work, we facilitated convenings of the Race Equity in Prevention and Race Equity in Justice Systems workgroups and conducted ad hoc research, evaluation, and technical assistance projects. This has included analyzing secondary data and proposing new analytic techniques (e.g., using disproportionality index calculations, geo-mapping) to better understand youth who are involved in the juvenile justice system. We have also engaged in research and evaluation of restorative justice practices and mentoring programs and helped to construct a SIM map to identify existing community resources for intervening with youth in need of services and opportunities to either mitigate or exacerbate disproportionality at key decision points (intercepts).

We began partnering with BHDP as a subcontractor in 2023 to solidify our in-person presence for the project and to add California-specific juvenile justice expertise.

**Project 2 (subcontractor, BHDP): Los Angeles County**

From 2019 to 2022, BHDP, working with the California Institute for Behavioral Health Services (CIBHS), completed an evaluation of the Los Angeles County Multidisciplinary Assessment Team (MAT). This evaluation included quantitative analysis of administrative data, qualitative analysis of completed assessment forms and court documents, stakeholder interviews, and surveys to assess the MAT process for identifying the strengths and needs of newly detained children and their families in Los Angeles County. This evaluation was a collaborative effort with the Los Angeles County Office of Child Protection, Department of Mental Health, and Department of Children and Family Services. The evaluation team worked with Los Angeles County to design performance measures to assess the timeliness and quality of the assessment process, along with linkage to treatment and integration into case planning, using existing data collected by the county and contracted providers. The evaluation design was reviewed and approved by the Los Angeles County Juvenile Court and youth and family advocates. As part of the evaluation design process, parents of all eligible youth and all eligible youth aged 12 and above were notified about the planned evaluation and provided the opportunity to ask questions or opt out of the evaluation. The evaluation also included demographic analyses to identify disparities in the assessment process based on race, ethnicity, and language.

[see RFP – need more info from Sam]

**Project 3: Elkhart County, Indiana**

TriWest has been providing technical assistance and evaluation services for Elkhart County, Indiana since 2019. This has included conducting SIM mapping of the juvenile justice system and other youth service systems, participating in a variety of steering committee planning processes, and evaluating the access, engagement and outcomes for youth at risk for involvement or involved in the juvenile justice system. We are also the independent evaluators for federal grants for youth crisis response services for both Elkhart and neighboring St. Joseph County and served as the independent evaluator of Oaklawn Psychiatric Center's three-county Certified Community Behavioral Health Center (CCBHC) from 2020 to 2024.

We recently helped Elkhart County to plan for and secure a grant from the Office of Juvenile Justice and Delinquency Prevention (OJJDP) to identify current weaknesses in the system and plan and assess promising and evidence-based prevention and intervention services that lead to a community-based continuum of care for youth at risk of becoming, or who are already, involved in the juvenile justice system as well as those transitioning out of it. This project includes:

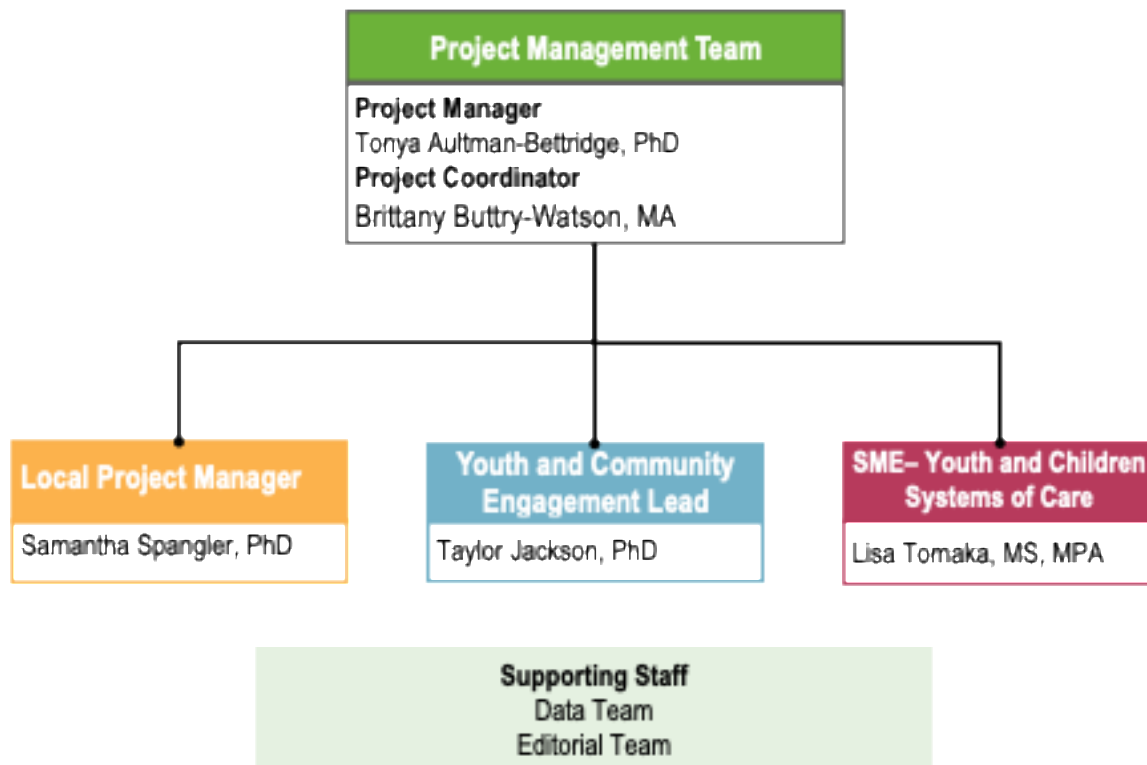
- **Asset mapping:** We identified a comprehensive list of programs provided in Elkhart County across all six service aspects of the OJJDP continuum with input from the Planning Council and a survey questionnaire. We mapped these programs using GIS and overlaid a social vulnerability map of the county over those locations.
- **Gap analysis:** We conducted key informant interviews with community providers and analyzed aggregate data from juvenile justice and the primary behavioral health provider in the county to identify gaps in community supports and barriers to quality care in the juvenile justice system.
- **Sequential Intercept Model:** We will also be using previously completed SIM maps to understand how youth with behavioral health needs flow through the justice system.
- **Final deliverable:** We will develop a comprehensive plan with feedback from the Planning Council and informed by the asset mapping survey, gap analysis and SIM maps.

The community will use the plan for accessing, delivering, and sustaining a community-based continuum of care that uses evidence-based prevention and intervention programs and best practices.

### 3.9. Team Qualifications

For this project, we have selected key TriWest and BHDP staff members to form an experienced and dedicated team that offers evaluation expertise in justice systems (juvenile and criminal) as well as in other social and human services systems that work to prevent justice system involvement. We understand the value and importance of a strong recovery ecosystem, with well-coordinated services and supports, to help people maintain recovery, attain housing and competitive employment, and improve their overall quality of life and other health outcomes. Our proposed leads have consulted extensively on assessing and identifying prevention, treatment, and recovery gaps and priorities in communities and complex systems.

The following organizational chart shows the proposed team structure for this project.



#### *Overall Project Lead/Project Manager*

**Tonya Aultman-Bettridge, PhD**, is a Partner and Chief Information Officer for TriWest Group (TriWest). Tonya has been with TriWest since 2002. She manages projects and provides consultation on systems change research and evaluation in health and human services, particularly juvenile justice systems and child welfare, as well as primary and behavioral health integration. She also guides policy and procedure development and implementation for privacy protections and data security.

Tonya has led large evaluation projects across the country. Currently, she is the project lead for a race equity juvenile justice technical assistance and evaluation project in Santa Clara County, California. She oversees evaluations for 10 SAMSHA-funded Certified Community Behavioral Health Clinic (CCBHC) implementation projects in four states as well as for five statewide Medicaid 1115 Demonstration Waivers.

Tonya led TriWest’s independent evaluation of the Washington State Title IV-E Waiver demonstration project. The evaluation was a comprehensive review of the rolling implementation of Family Assessment Response—an alternative to traditional child protective services investigations—throughout the state. It included an assessment of short-term impacts and long-term outcomes for families, communities, and department staff as well as a multi-year cost analysis of the implementation. The project involved assessing implementation challenges and successes across offices, including unique challenges and opportunities providing services to families that had complex issues and often extensive child protective services histories.

Tonya also serves as TriWest’s Privacy and Information Security Official and chairs its federally registered Institutional Review Board. She leads efforts to create internal policy and provides oversight on all TriWest projects regarding the protection of personal health information and personally identifiable information.

Prior to her work with TriWest, she served as the Senior Researcher for the Colorado Division of Youth Corrections and was a research project director for the Center for the Study and Prevention of Violence at the University of Colorado, Boulder, where she directed the Colorado Safe Schools – Safe Communities program.

Tonya earned a PhD in Public Affairs from the University of Colorado, Denver, in 2007. She has a master’s degree in criminal justice (MCJ), also from the University of Colorado, Denver, which she earned in 1997.

Tonya is a member of the American Evaluation Association and the International Association of Privacy Professionals.

*Local Project Manager*

**Samantha Spangler, PhD**, is the owner of Behavioral Health Data Project (BHDP).

At BHDP, Samantha leads research, evaluation, and consultation projects to help organizations use qualitative and quantitative data to understand the effectiveness of their services and identify ways to improve the quality, equity, and outcomes of their services.

In addition to working directly with county human services agencies, BHDP has partnered with the California Institute for Behavioral Health Solutions (CIBHS) to evaluate the current Mental Health Services Act (MHSA) Five-Year Workforce Education and Training Plan, as well as the Cultivating Outcomes through Equity in Behavioral Telehealth (COE-BT) learning collaborative. COE-BT supported behavioral health providers to partner with trusted community partners to identify and implement community-driven policy improvements to promote equity and measure client-centered and recovery-oriented behavioral health outcomes.

Samantha collaborated with LA County to design a MAT evaluation that prioritized streamlining processes for children and families and assessing adherence to trauma-informed best practices, while fulfilling the requirements of an LA County Juvenile Court Research Petition.

## TriWest Group Response – San Mateo County

Samantha holds a PhD in Neuroscience from Erasmus Medical Center in Rotterdam, The Netherlands, and completed an Interdisciplinary Autism Research Training Program at the UC Davis MIND Institute.

### *Project Coordinator*

Brittany Buttry-Watson, MA, will serve as the project coordinator. Brittany has 10 years of professional experience, including project management, clinical research, and direct service work, in the behavioral health and criminal justice fields. She manages projects and the development of deliverables for health and human service projects at TriWest. Brittany has experience coordinating clinic- and state-level SAMHSA-funded projects, including CCBHC and PIPBHC grants in Illinois, and a System of Care evaluation and a 988 evaluation in North Dakota. In her prior job, she coordinated a Behavioral Health Treatment Court Collaborative grant in Pennsylvania.

Prior to joining TriWest, Brittany was a research coordinator at a psychiatric hospital where she managed and supported research activities on a suicide risk assessment study, including assessing suicidal risk and providing safety management for the participants. She has direct service experience in the areas of criminal justice re-entry, shelter outreach and case management, and community-based services for high-risk children and youth. She ran a mentoring program for adults incarcerated at Allegheny County jail (Pittsburgh) and state prisons in Pennsylvania and taught classes in the jail on preparing incarcerated adults for community reentry. Brittany's graduate work focused on alternatives to incarceration for youth in the juvenile justice system.

### *Youth and Community Engagement Lead*

Taylor M. Jackson, PhD, is TriWest Consultant and Project Manager for consultation and evaluation projects in various health and human service fields. She primarily assists with qualitative data collection and analysis, along with project management on SAMHSA-funded projects.

As Project Manager for the Health Equity Project for Healthy Minds Policy Initiative, in Tulsa, Oklahoma, Taylor has helped develop a health disparities framework, researched existing data related to racial equity in the community, and compiled resources on the impact of historical trauma on health and well-being. Taylor played a crucial role in developing the Truth, Racial Healing, and Transformation Campus Climate Assessment Toolkit for the American Association of Colleges and Universities and helped develop a campus climate assessment tool to promote narrative change and racial healing in institutions of higher education. Taylor has helped conduct key informant interviews, analyzed qualitative data, created data collection protocols, and constructed survey instruments for services and support staff.

Prior to joining TriWest, Taylor was a research assistant for 5 years and a sociology instructor for 3 years at Florida State University. She also was the Student Coordinator for Diversity and Inclusion at the University of Tampa. Taylor earned her PhD in sociology in 2021 and her MS in sociology in 2018 from Florida State University. Her doctoral dissertation, *Black Women, Self-Care Behaviors, and Online Platforms*, examined how racial and gender minorities use social media platforms to improve their mental health and wellness.

*Subject Matter Expert – Youth and Children Systems of Care*

Lisa Tomaka, MS, MPA, will serve as a subject matter expert on children and youth behavioral health care and tribal relationships. Lisa, a Principal at TriWest, has 30 years of experience working with children, youth, and families, with a focus on systems of care and implementing evidence-based practices to improve outcomes. She has worked with tribal nations and Native-run organizations to conduct system assessments, evaluate program implementation, engage key stakeholders in planning and implementation, and meet federal grant reporting requirements. Lisa is currently the project lead responsible for the evaluation of North Dakota Behavioral Health's statewide System of Care grant and three Yakama Nation Behavioral Health grants addressing children's mental health, trauma, and suicide prevention. She is also the project lead responsible for all aspects of an Office of Juvenile Justice and Delinquency Prevention grant in Elkhart, Indiana.

Prior to joining TriWest, Lisa was instrumental in redesigning children's mental health service delivery in El Paso, Texas. She has also developed and implemented a college readiness program for at-risk minority high school students and evidence-based prevention and early intervention programs for families at risk of child welfare system involvement.

In addition to the team members assembled for this project, TriWest will involve our data and editorial team as needed. Our data team includes staff members with statistical proficiency (including Excel, SPSS, SAS, STATA, R, and SQL), epidemiological training, survey construction and analysis expertise, GIS capabilities, and data visualization expertise (Tableau, Canva, and Datawrapper).

### **3.10. References**

An additional reference for our proposed subcontractor, Samantha Spangler is included here.

#### **Reference 1: Santa Clara County - Department of Probation (Reference for both TriWest and BHDP)**

*Gladys C. Tran*

Youth Pathways for Positive Progress (YP3) | Program Manager II  
County of Santa Clara | Probation Department  
840 Guadalupe Parkway, San Jose, CA 95110  
Gladys.C.Tran@pro.sccgov.org  
Mobile: 669-899-7719

#### **Reference 2: Elkhart County, Indiana (TriWest Group)**

*Anna Sawatzky*

Director of The SOURCE, Elkhart County's System of Care  
330 Lakeview Dr., Goshen, IN 46528  
[anna.sawatzky@oaklawn.org](mailto:anna.sawatzky@oaklawn.org)  
Phone: 574-533-1234, ext. 2878

#### **Reference 3: Los Angeles County – Office of Child Protection (BHDP)**

*Minsun Meeker*

Assistant Executive Director, Los Angeles County Office of Child Protection  
500 West Temple Street, Room 383, Los Angeles, CA 90012  
[MMeeker@ocp.lacounty.gov](mailto:MMeeker@ocp.lacounty.gov)  
Phone: 213-893-0862

## TriWest Response – San Mateo County 3.11 RFP 2025-RFP-005

### 3.11 Fee Proposal

The budget presented below is based on estimated staff time need to complete the scope of work outlined in this proposal and a blended, all-inclusive and discounted hourly rate of \$225 per hour. TriWest will bill only for direct hours worked (we will not bill for travel for this project). If the amount of effort needed to accomplish all tasks to the complete satisfaction of the JJSC exceeds the budgeted hours, we will not invoice for any additional hours.

We strongly believe in this work and believe that we can achieve maximum value for Probation. We recognize that our rates may not be the lowest. However, we believe our experience will lead to efficiencies for Probation that will result in a cost-effective set of deliverables.

We are also willing to work with Probation to adjust the budget to accommodate any resources limitations that we are unaware of as we complete this proposal. Our commitment is to help you to improve the lives of youth in your jurisdiction while supporting our staff and their families.

The following tables correspond to our scope of work timeline and lists the number of hours needed to successfully complete each of the juvenile justice services.

(a) Program Evaluation & Reporting Activities (Repeats Annually)	Estimated Hours of Effort				
	Year 1	Year 2	Year 3	Year 4	Year 5
Annual Kick-off meeting with probation staff and partners (Years 1-5)	8	8	8	8	8
Monthly planning meetings with probation staff	24	24	24	24	24
Finalize workplan, timeline and communication plans (Year 1)	10				
Annual review of evaluation priorities and questions	4	4	4	4	4
Quarterly meetings with COBs (estimated, TBD)	8	8	8	8	8
Develop evaluation plan review with JJCC (Year 1)	8	8	8	8	8
Update plan annually and present to JJCC (Years 2-5)					
Collect data from CBOs and other secondary sources	100	70	70	70	70
Present evaluation progress and key preliminary findings, annually	12	12	12	12	12
Prepare annual reports: YOBG and JIRBG programs (Report 1) and JJCPA and JPAF programs (Report 2)	50	35	35	35	35
<b>Deliverable: YOBG/JIRBG Annual Report; JJCPA/JPAF Annual Report (hours included above)</b>					
<b>Deliverable: Present report findings to JJCC</b>	4	4	4	4	4
<b>Total hours</b>	<b>228</b>	<b>173</b>	<b>173</b>	<b>173</b>	<b>173</b>
<b>Total Cost</b>	<b>\$ 51,300</b>	<b>\$ 38,925</b>	<b>\$ 38,925</b>	<b>\$ 38,925</b>	<b>\$ 38,925</b>
(b) Local Action Plan Development Activities	Year 1	Year 2	Year 3	Year 4	Year 5
Attend all Quarterly JJCC Meetings	16	16	16	16	16
Review 2025-2030 plan and facilitate listening sessions				60	
Complete community Asset map and/or SIM map				30	
Collect additional data (as needed)					40
<b>Draft initial 2030-2035 LAP &amp; Review with JJCC</b>					50
<b>Deliverable: Final 2030-2035 LAP for Juvenile Services</b>					
<b>Total hours</b>	<b>16</b>	<b>16</b>	<b>16</b>	<b>106</b>	<b>106</b>
<b>Total Cost</b>	<b>\$ 3,600</b>	<b>\$ 3,600</b>	<b>\$ 3,600</b>	<b>\$ 23,850</b>	<b>\$ 23,850</b>

**TriWest Response – San Mateo County 3.11 RFP 2025-RFP-005**

(c) Evaluation of Existing Resources Activities (Repeats Annually)	Year 1	Year 2	Year 3	Year 4	Year 5
Kickoff - Monthly planning meetings with probation staff (hours included in task (a) above)					
Develop a full community Asset Mapping/SIM mapping annual strategy (Year 1) Review strategy annually (Years 2-5)	25	10	10	10	10
Conduct mapping data collection and analysis to support JJRBG/LAP Planning	50	40	40	20	40
Conduct community listening sessions to discuss and refine mapping results	30	30	30	30	30
<b>Deliverable: Annual Resource Map Draft</b>	40	30	30	30	30
<b>Deliverable: Final update of Probation's Resources Guide for Youth and Their Families</b>	20	20	20	20	20
Use resource maps to inform all planning activities and annual reports (no hours, activities are in other tasks)					
<b>Total hours</b>	<b>165</b>	<b>130</b>	<b>130</b>	<b>110</b>	<b>130</b>
<b>Total Cost</b>	<b>\$ 37,125</b>	<b>\$ 29,250</b>	<b>\$ 29,250</b>	<b>\$ 24,750</b>	<b>\$ 29,250</b>
(d) Juvenile Justice Crime Prevention Act (JJCPA) and Youthful Offender Block Grant (YOBG) Program Activities (Repeats Annually)	Year 1	Year 2	Year 3	Year 4	Year 5
Kickoff - Monthly planning meetings with probation staff (hours included in task (a) above)					
Review existing JJCPA and YPBG plans and annual reports	10	4	4	4	4
Determine data collection needs (including KIIs and secondary data sources)	4	4	4	4	4
Collect data to support JJCPA and YOBG program planning (beyond data collected for other tasks)	10	10	10	10	10
<b>Deliverable: Work with probation to update annual program plans</b>	30	30	30	30	30
Review plans and plan progress bi-monthly with probation staff (hours included above in task (a) above)					
<b>Total hours</b>	<b>54</b>	<b>48</b>	<b>48</b>	<b>48</b>	<b>48</b>
<b>Total Cost</b>	<b>\$ 12,150</b>	<b>\$ 10,800</b>	<b>\$ 10,800</b>	<b>\$ 10,800</b>	<b>\$ 10,800</b>
Juvenile Justice Realignment Block Grant (JJRBG) Plan (Repeats Annually)	Year 1	Year 2	Year 3	Year 4	Year 5
Kickoff – Attend JJCC Realignment Subcommittee Meetings (estimated, TBD)	12	12	12	12	12
Collect data (beyond above activities) needed for serious youth offenders and combine with asset/SIM mapping results	20	20	20	20	20
Work with JJCC Realignment Subcommittee to draft JJRBG Annual Plan	30	30	30	30	30
Conduct community listening sessions to discuss and refine the JJRBG annual plan (to supplement listening sessions associated with other tasks)	10	10	10	10	10
<b>Deliverable: Final JJRBG Annual Plan</b>	20	20	20	20	20
<b>Total hours</b>	<b>92</b>	<b>92</b>	<b>92</b>	<b>92</b>	<b>92</b>
<b>Total Cost</b>	<b>\$ 20,700</b>	<b>\$ 20,700</b>	<b>\$ 20,700</b>	<b>\$ 20,700</b>	<b>\$ 20,700</b>
<b>Total Cost for all Juvenile Services</b>	<b>\$ 124,875</b>	<b>\$ 103,275</b>	<b>\$ 103,275</b>	<b>\$ 119,025</b>	<b>\$ 123,525</b>

**Adult Services**

We will use the same rate and process to develop a proposed budget for adult and pretrial services. However, it is not possible to create the same level of budget for adult and pre-trial services. We are open to negotiations and believe that **the scope of work described in this proposal for adult and pre-trial services could be completed for \$30,000 to \$40,000 annually.**